DOCUMENT RESUME

ED 149 773 IR 005 611

AUTHOR Mavor, Anne S.; And Others
TITLE The Role of the Public Libraries in Adult Independent Learning. Part II. Final Report.
INSTITUTION College Entrance Examination Board, New York, N.Y.
SPONS AGENCY Bureau of School Systems (DHEW/OE), Washington, D.C. Library Research and Demonstration Branch.; Council on Library Resources, Inc., Washington, D.C.; National Endowment for the Humanities (NFAH), Washington, D.C.
PUB DATE Sep 76
NOTE 117p.; For related documents, see ED 094 681, ED 126 936

EDRS PRICE MF-$0.83 HC-$6.01 Plus Postage.
DESCRIPTORS *Adult Education Programs; Adult Learning; *Independent Study; Information Services; *Library Extension; *Library Programs; Library Role; Library Services; *Program Evaluation; Program Planning; *Public Libraries; Tables (Data)

ABSTRACT

Part two of the final report on the adult independent learning program focuses on the following: (1) discussion of the 11 data collection categories developed to meet the information needs of specific groups--advisors working with adult learners, planners monitoring service performance, library policy decision makers responsible for determining the future of the service, and other libraries interested in implementing similar services; (2) aggregated data analysis of the 11 categories of information collected by the participating libraries between July 1975 and July 1976; (3) policy questions and issues raised as a result of the interpretation of the data analysis; (4) short and long range dissemination activities; and (5) conclusions. The program served 934 learners in this time period; 216 of them were light or new project library users. The results of the evaluation made by the learners completing the program indicated that 91 percent were satisfied with the service and that 92 percent would use the service again for a new learning project. Other outcomes were (1) the successful integration of the service with program planning and management; (2) formation of the Consortium of Public Library Innovation; (3) identification of the conditions which must be met for the learners advisory service to succeed; and (4) identification of background and training requirements associated with the design, modeling, and implementation of a new service concept. Descriptions of the advisory and information support services, as well as data collection forms and recording instructions, are appended. (Author/JPF)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

FINAL REPORT

PART II: THE ROLE OF THE PUBLIC LIBRARIES IN ADULT INDEPENDENT LEARNING

Anne S. Mavor

Jose Orlando Toro

Ernest R. DeProspo

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Jose Toro

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

College Entrance Examination Board

New York

September 1976

ACKNOWLEDGMENTS

The work described in this report was jointly supported by the Council on Library Resources, the National Endowment for the Humanities and the United States Office of Education, Office of Library Research and Demonstration. The findings do not reflect the position or the policies of any of these agencies.

There are many individuals who have made important contributions to the project during the past year. Particular thanks is extended to the nine library directors who have supported the work of the Research Study Group and will continue to provide this support through the Consortium for Public Library Innovation.

A second important group of contributors is the learners' advisors. These librarians have committed themselves to the provision of in-depth serivce to the adult learner and to documenting this process.

A third group deserving special recognition is the Resource Faculty. This group of librarians was responsible for disseminating information about the project to over 500 decision makers in small and medium-sized libraries through a series of 24 one-day seminars held throughout the country.

We would also like to acknowledge the members of the Research Study Group. These librarians took responsibility for overseeing data collection, for coding data for computer input, and for interpreting results. Without their efforts this report would not have been possible. They are listed below by library.

- Atlanta Public Library: Paul Porterfield
- Denver Public Library: Thomas LeFree
- Enoch Pratt Free Library: Emily Reed
- Miami-Dade Public Library: Catherine Conduitte
- Portland Public Library: Doris Garber
- Salt Lake City Public Library: Thomas Phelps

- St. Louis Public Library: James Lyons
- Tulsa City-County Library: Suzanne Boles
- Free Public Library of Woodbridge: Chris Stahanovich

Special appreciation is extended to Thomas Phelps who served as the central data coordinator and to Lorna Doran, Project Assistant in the National Office, who contributed much of her talent to the effective and efficient operation of the total effort and to the preparation of this report.

PREFACE

The public library environment is the overriding constraint within which basic strategy and pursuant tactics for the introduction of planned change must take place. The Learners Advisory Service focused on effecting change in basic management structure, from top administration to the on-line librarian. Second-line managers constituted the most critical element for producing the desired change.

This report presents the ideal solutions developed by the project team for the implementation of the Learners Advisory Service. The central questions facing project leaders were: How can the public library best meet the needs of the adult independent learner? And, how will the public library leadership know that the adult independent learners' needs are, in fact, being met? Answers to these key questions necessitated that the service itself have built-in research and evaluation components.

This particular strategy represented a substantial deviation from the norm in that the research and evaluation (policy) aspects of the Learners Advisory Service are part of the service – not a posteriori after thoughts. Essentially, these components are intended to provide the librarians with on-going information for decision making. The actual tactics employed in the provision of the Learners Advisory Service represented the reality of adjusting to and compromising with the given library environments encountered by the project team.

The constraints were, for the most part, the kinds normally expected. Public agencies in general, and public libraries in particular, tend to hold hostile attitudes towards both research and evaluation. As non-profit institutions, composed heavily of "humanist"-oriented individuals, the public library is often extremely skeptical of those activities which seem scientific. Librarians at every level in the organization resist the notion that the things they do be measured. Such an environment is not conducive to any continuing data

collection system. This situation would be true for the routine programs of the library and it is compounded when the task involves the introduction of innovations.

The Learners Advisory Service represents an innovation in a number of key areas. However, the two most important ones deal with the nature of the service itself and the leadership responsibility placed on the second-line administration.

Whether or not librarians would or could accept the Learners Advisory Service as a legitimate activity of the public library constituted the most basic constraint. The service itself is predicated on face-to-face, on-going advisory encounters with learners. That is, the service is highly personal and added-on; each meeting with the learner is intended to build on the last one. Obviously, for that librarian who is, in fact, more thing than person oriented, such a service can be very threatening.

The second key constraint area was one in which second-line managers (from assistant directors to adult service coordinators), holding line and staff responsibilities, were put in the position of negotiating the manner in which the Learners Advisory Service would be introduced into their library. This requirement placed them in the position of being identified with an innovation which would hold, through the research and evaluation components, both superiors and subordinates accountable for their actions.

The policy questions raised throughout the three years of the project have largely dealt with the human resource capacity to adjust to the innovation. The technical accomplishments of the learner's advisors and the members of the evaluation management teams has been considerable. In the final analysis the success of planned change will rest with the ability of the managers of the public library to overcome their people weaknesses.

TABLE OF CONTENTS

Chapter		Page
I	INTRODUCTION	1
II	THE DEVELOPMENT OF A DATA COLLECTION AND EVALUATION SYSTEM	5
	A. An Evaluation Framework	5
	1. Characterization of the Population	5
	2. Characterization of the Adult Independent Learner	6
	3. Characterization of the Advisor-Learner Interaction	7
	4. Characterization of the Advisory Service – Community Organization Cooperation	8
	5. Characterization of Internal Functions and Procedures	9
	6. Characterization of the Services	10
	7. Characterization of Service Effectiveness and Efficiency	10
	8. Characterization of the Service Costs	11
	9. Characterization of the Communications Campaign	12
	10. Characterization of the Project Management Structure	13
	11. Characterization of the Training	13
	B. Application of the Evaluation Framework	14
	1. The Common Data Collection and Evaluation System	15
	2. Management of the Common Data Collection and Evaluation System	23
III	AGGREGATE RESULTS	25
	A. The Learner Profile	25

Table of Contents (Continued)

Chapter		Page
	1. Demographic Characteristics	25
	2. Library Use Patterns	32
	3. Project Characteristics	33
	4. Learning Style Characteristics	43
	B. The Service Profile	47
	1. The Services	47
	2. Service Evaluation	50
	C. The Institutional Profile	53
	D. The Communications Profile	54
	E. Summary	56
IV	POLICY CONSIDERATIONS	59
	A. Service Feasibility	60
	1. Learner and Advisor Satisfaction	60
	2. Information Support Availability and Usefulness	61
	3. Staff Response	62
	4. Facilities	63
	B. Service Demand and Cost	63
	C. Data System Effectiveness At the Individual Library Level	64
	D. Conclusions	65
V	DISSEMINATION OF THE INNOVATION	67
	A. Short Range Dissemination Activities	68
	1. Planning and Conduct of Seminars	70
	2. Seminar Evaluations by Participants	71
	3. Summary	72

Table of Contents (Continued)

Chapter		Page
	B. Long-Range Dissemination Activities: Consortium for Public Library Innovation	73
VI	CONCLUSIONS	75
	APPENDIX A - ADVISORY AND INFORMATION SUPPORT SERVICES	A-1
	APPENDIX B - DATA COLLECTION FORMS AND RECORDING INSTRUCTIONS	B-1

LIST OF FIGURES

Figure		Page
1	Occupational Distribution	26
2	Age Distribution	27
3	Educational Distribution	28
4	Comparison Between Employed Males and Females	31
5	Learning Goal Distribution	35
6	Areas of Interest Distribution	36
7	Learning Method Distribution	44
8	Learning Location Distribution	45

LIST OF TABLES

Table		Page
1	Adult Learner Profile	17
2	Service Profile	20
3	Institutional Profile	22
4	Communications Profile	22
5	Comparison Between Males and Females on Education, Age and Occupation	30
6	Library Card by Project Library Use	32
7	Project Library Use Patterns Related to Demographic Characteristics	34
8	Learning Goal by Area of Interest	37
9	Changes in Project Scope	38
10	Occupation by Learning Goal and Content Area of Interest	40
11	Education by Learning Goal and Content Area of Interest	41
12	Age by Learning Goal and Content Area of Interest	42
13	Sex by Learning Goal and Content Area of Interest	43
14	Type of Contact	46
15	Time Between Visits	47
16	Advisory Services: Percentage of Learners Receiving Each Service	48
17	Information Support Services: Percentage of Learners Receiving Each Service	49
18	Availability of Specific Materials	50
19	Usefulness of Specific Materials	51
20	Learner and Advisor Evaluations	52
21	Time to Complete An Interview	54
22	Seminar Development and Implementation Activities	69

I. INTRODUCTION

Learners' Advisory Services are being offered to adult independent learners by major public library systems throughout the country. The purpose of these services is to provide adults with a viable learning alternative to formal classroom instruction. The services are of two kinds, advisory and information support. Advisory Services involve a librarian (learner's advisor) and a learner working together to define learning goals, to delimit the learner's content area of interest and to develop a learning plan to assist the learner in meeting his/her learning goals. Information Support Services involve the provision of materials, the development of study aids and the making of referrals either inside or outside the library. These information support services serve to implement the learning plan. For a more complete description of these services see Appendix A.

The development of the Learner's Advisory Service has required a three-year effort on the part of the participating libraries. This effort has been guided, supported and coordinated by the Office of Library Independent Study and Guidance Projects, College Entrance Examination Board. During the first year the libraries focused on service planning and staff training. Service planning was accomplished through program planning and evaluation groups established at each library. These groups were composed of both library administrators and library staff; their function was to design services which met the needs in their respective communities and to develop systems of forms and procedures for evaluating these services. Staff training involved providing potential learners' advisors with an introduction to the skills and knowledges required in working with adult independent learners. This training was given by consultants engaged by the Office of Library Independent Study.

The second year of the program was devoted to pilot testing the planned services. These pilot testing efforts generally involved offering services on a small scale and applying a data collection system for purposes of description and evaluation. Each library designed its own data collection system based on individual assessments of the information needed by advisors to work with learners and on the information needed by administrators to make decisions about continuing, modifying or expanding the service. Pilot testing results led to identification of additional training needs for learners' advisors, streamlining of service delivery procedures and modifications to data collection and evaluation systems. Overall, it was demonstrated that adult learners could be successfully served through the public library. Most of the nine libraries designed additional training for their advisors to prepare them for continued service provision in the future. A detailed discussion of service planning and pilot testing is presented in Final Report Part I: The Role of the Public Libraries in Adult Independent Learning.[1]

There were two major outcomes of the pilot testing effort. First, there was a recognition on the part of the libraries that provision of in-depth Advisory and Information Support Services was a viable and useful concept. Second, there was a realization that a commonly shared system for describing and evaluating these services would be of value. The third year of the program was devoted to service expansion, to the development and use of a common data collection system and to the dissemination of information about service planning and delivery to public libraries throughout the country. This report, Part II of the Final Report will focus on these activities: Chapter II discusses the development of a common data collection system, Chapter III presents the

---

[1] Mavor, A. S., Toro, J. O., and DeProspo, E. R. Final Report Part I: The Role of the Public Libraries in Adult Independent Learning. College Entrance Examination Board, New York, New York, January 1976.

results of the aggregate data analysis, Chapter IV discusses policy implication, Chapter V deals with short and long range dissemination efforts and Chapter VI presents conclusions.

II. THE DEVELOPMENT OF A DATA COLLECTION AND EVALUATION SYSTEM

A. An Evaluation Framework

The need for a common framework to guide the participating libraries in data collection and project description was recognized as the service testing phase was initiated. The purpose of the framework was to provide a comprehensive set of data collection categories which would meet the information needs of advisors working with learners, of service planners monitoring service performance, of library policy decision makers responsible for determining the future of the service, and of librarians outside the system interested in implementing similar services in their libraries. Further, it was felt that a common set of data categories would enhance communication among the participating libraries on key issues of service planning, testing and implementation.

The identification of data categories for inclusion in the framework was facilitated by a review of the data collection forms developed by each library and through discussions with selected service planners and evaluators. The finalized framework was composed of eleven data categories. Some of these categories relate to characterizing the population of the community and the learners attracted to the service, some relate to describing services and procedures for service delivery, some relate to evaluating service cost and effectiveness and some relate to describing service planning and management activities. A description of each data category is presented in the following sections.

1. Characterization of the Population

This category includes a demographic characterization of the community population in terms of age, sex, education, occupation and ethnic background. In large urban areas where population characteristics differ by neighborhood, descriptions might be developed of population subgroups

served by various library branches. This information is useful because it provides a basis for demographically comparing learners attracted to the service with the general population of the community. Discrepancies between population and learner distributions may lead to considerations for future promotional efforts. As an example, if there are proportionately fewer blue collar workers who are learners than exist in the population, the library staff may wish to alter its promotional efforts to attract more blue collar workers. Some questions concerning population characteristics include:

- What is the age distribution of the population served by each library agency? What proportion are adults?
- What is the educational level of the population served by each library agency? What percentage completed high school, have some college, are college graduates, etc.?
- What percentage of the population served by each library agency is currently enrolled in a formal educational program (high school, college, trade/vocational school, by age group)?
- What is the distribution of jobs in the population served by each library agency – Type of job by number of people employed in that job?
- Are there any local membership organizations representing subject interests which help to further define the population for the purposes of your library? If so, what are these groups and what is their membership?

2. Characterization of the Adult Independent Learner

This category includes a description of the demographic characteristics of the learners as well as a characterization of the learners' project goals, area of interest and learning styles. This information is useful in helping the advisor know what to expect from the adult learner. If relationships exist between demographic characteristics and learner project choices then advisors may be able to make some preliminary plans towards assisting a new learner based on his/her demography. Some of the questions associated with describing the learners are as follows:

- What is the age distribution?
- What is the distribution of educational background?
- What is the distribution of jobs?
- How do adult independent learners using the library compare with the general population in age, education, vocation?
- What kinds of learning goals do the learners using the library have? Do these goals relate in any way to age, education, vocation of the learner?
- What are the content areas in which the learners are interested? Are some content areas more popular than others? Do content areas relate in any way to age, education, vocation of the learner?
- How long are the projects - a week, a month, etc.?
- How and where do learners prefer to learn?
- How many learners have used the service?
- What is the average number of contacts per learner?
- What is the average length of time between contacts?
- What projections can be made from the learners using the library to the potential learners in the community? Can information obtained about learners using the services be generalized to corresponding segments of the population of the community?

3. Characterization of the Advisor-Learner Interaction

This category involves a description of the tasks and procedures associated with offering the advisory service. The development of this description requires an analysis of tasks engaged in by the advisor at each meeting with the learner. Of particular interest are the procedures used by the advisor in assisting the learner in goal definition, in content selection and in learning plan development. Such description has at least two positive values: First, it serves to identify procedures and techniques which relate to successful advisory service provision; second, it provides a basis for identifying future training needs. Some specific questions associated with this description include:

- What methods are employed by the advisor in working with the learner to develop a learning plan?
- How can the first meeting between the learner and the advisor be characterized? What does the advisor do? What kind of information is he/she trying to obtain from the learner? Has the advisor developed a more or less standardized approach to the learner? What can be expected of the learner in the first meeting?
- How would subsequent sessions with the learner be characterized? Who does what? What is the role of the advisor? What is the role of the learner?
- How are subsequent sessions arranged – by the learner, by the advisor?
- What is the average length of a session?

4. Characterization of the Advisory Service – Community Organization Cooperation

This category involves a description of the development and operation of referral services. It was felt that the referral services should be described in detail because all participating libraries had included it as an information support service. The description of the steps required to develop this support service will be useful to other libraries showing an interest in establishing a similar service. Information concerning the operation and effectiveness of the service will be useful to managers and policy makers who must decide the future of the service. Some of the key questions involved in describing the service development are:

- What criteria were used to select organizations to participate in the referral system?
- What procedures were used for establishing cooperative arrangements? How were contacts made? Were meetings required? Were specific individuals in the organization selected to receive referrals from the library? Are costs involved in obtaining cooperation? Does the organization prefer to work through the library or directly with the learner? Will referrals also be made to the library.
- What procedures were used to insure that cooperation continues?

- How were files formatted and set up to identify appropriate agencies for the learner? What are the updating procedures?
- How much personnel time is needed to develop a referral system?

Questions related to describing the operation and effectiveness of the service include:

- How many or what proportion of the learners expressed needs could best be met (in judgment of librarian) through a referral service?
- How were appointments made? By advisor? By learner? With a specific person at the organization?
- How frequently (average) are referral appointments kept by the learner?
- What are procedures for following up the progress of the learner to see if referral was completed, how it went, etc.? How are referrals evaluated? How does the library maintain contact with the learner?

5. Characterization of Internal Functions and Procedures

This category involves a description of the procedures used and files developed for effectively linking learner needs with services and for documenting the services provided. There is some overlap between the information required in this description and the characterizations developed of advisor tasks and referral service operation. However, additional factors are considered in terms of recording forms, the flow of information from the beginning to the end of a learning project, the steps associated with providing library resources and the type of coordination needed between different staff members working to support the same learner. Questions associated with this description are as follows:

- What are the specific tasks to be accomplished by learners, advisors, support staff?
- What procedures are used to facilitate cooperation when more than one staff member is involved in assisting a learner?
- What forms and files have been set up to keep track of what happens to a learner as he/she progresses through his/her learning project? Is this information easily accessible to the learner, to the library staff working with the learner?

6. Characterization of the Services

The category includes a description of advisory and information support services provided to adult independent learners and the frequency with which each type of service was provided to identifiable user groups. Of particular interest is a discussion of modifications to initially designed services based on experiences with learners and the addition of new services resulting from learner demands. It is important to specify why certain planned services were not offered with expected frequency. One possible reason might be lack of preparation on the part of advisors; another reason might be an incomplete needs assessment prior to service design. Specific questions associated with service description include:

- What services were initially designed for the learner?
- What services were added as a result of learner need?
- What modifications were made to services as service testing progressed?
- What was the demand level for each service? How many learners use it more than once?
- How many referrals were made? How many bibliographies were used? How many study guides were created? How many library materials were recommended?

7. Characterization of Service Effectiveness and Efficiency.

This category describes the effectiveness of advisory and information support services as judged by learners and advisors. Although these measures may be subjective, they can be extremely useful if obtained on a continuous basis. Evaluations of each service can be made at the time the service is provided as well as at project completion. Specific evaluations are of particular value to advisors in adjusting services as a project progresses. A second area in which evaluation is important is the efficiency of service delivery. Evaluations in this area are quantative in that they deal with such

issues as the time required to provide a service. Some questions relating to effectiveness and efficiency are listed below:

- How useful was each service provided to each learner?
- What was the overall feeling of learners regarding the value/usefulness of the library's assistance in planning and conducting an independent study project?
- What was the overall feeling of the learner's advisor regarding the usefulness of the services provided to each learner?
- What percentage of initially recommended materials was not available on-site?
- How much time was required to get materials to the learner from the on-site collection? From other resources? How much time was required for library staff to coordinate in providing a service? Were these time lags acceptable to the learner? Should procedures be altered to shorten service delivery time?
- How much time was required to make a referral (average, range)?

8. Characterization of the Service Costs

This category includes a description of personnel time and material costs associated with service provision. The description of personnel time focuses on how all levels of personnel involved in providing a service allocate their time to various aspects of diagnosing learning needs, developing learning plans, selecting and providing support services, documenting services and evaluating services. Material costs involves a detailing of funds required for such support services as inter-library loan, material purchase, photocopying, etc. Cost information provides an important input into the decision of whether a service should be offered in the future in its current form. The other major inputs to this decision are the demand level for the service and the judged effectiveness of the service by both learners and advisors. The two question areas associated with cost are:

- What proportion of professional, paraprofessional and clerical time was spent on each task, e.g., working with the learner - by session, preparing individually tailored study guides, locating materials from other resources, following up a referral, etc.)?

- Were there any costs associated with referral charges, inter-library loan, equipment rental, acquiring new materials for the collection, photocopying, etc.?

9. Characterization of the Communications Campaign

This category involves a description of all promotional materials developed and used to attract adults to the service. Materials created by the National Office for use by all participating libraries can be compared with locally designed materials in terms of purpose, coverage, media, frequency of use and effectiveness in attracting potential learners. Information on the relative effectiveness of each promotional form in bringing learners of different age, educational level and occupation in contact with the service will provide a basis for making judgments about future promotional efforts. Another input to decisions about promotional efforts is the comparison between the demographic distribution of the community and the learners using the service. Some specific questions for describing and evaluating the promotional campaign are as follows:

- What was the purpose of the national publicity? The local publicity?
- What was the content of the national publicity? The local publicity?
- What media were used for disseminating information? Were some media more effective than others in attracting independent learners to the library?
- How frequently were promotional messages run in each of the media?
- What are the characteristics of the independent learners attracted by the publicity? Are these the learners for which the promotional material was targeted?
- Are learners representative of the community or are some groups being attracted while others are not?

10. Characterization of the Project Management Structure

This category involves a description of the project management structure and the relationship of this structure to planning, development, testing, and implementation activities. Specifically, description focuses on planning group organization and on changes in this organization for purposes of monitoring and evaluating service testing and implementation. Such description highlights those aspects of management structure which led to success in each phase from planning through implementation. Questions in this area include:

- How was project management set up within the library during the initial planning phase? How are members of the planning group selected? Has this structure changed for testing, implementation?
- Who is responsible for overseeing the provision of the services during the service test, implementation? How are decisions made about modifying services, changing procedures, etc.?
- Do procedures exist for sharing information and problems among the learners advisors? What are these procedures?
- What are the procedures for insuring that project management has adequate and timely data for making decisions about services, for monitoring service efficiency and effectiveness?

11. Characterization of the Training

This category involves a description of the National and local training programs and the value for project managers and learner advisors. Characterization of local training efforts for learners advisors includes descriptions of the procedures for deriving training requirements from the tasks of the advisor and the skills, knowledges and attitudes required to perform each task effectively. The description of advisor tasks in interacting with the learner and in performing other service functions provides an important input. Questions to be addressed in this area are as follows:

- What was the effect of training provided by the national office on developing service plans? On providing service during testing and implementation?

- What additional training was needed in each library for management to insure successful adult independent learner services? For learner advisors?
- How was additional training provided? By whom? On what schedule, etc.?
- How did training affect attitudes? Performance?
- Are there certain sets of skills, knowledges and attitudes that are more appropriate as guides to selection of advisors than to development of training?

B. Application of the Evaluation Framework

There are two types of data categories in the evaluation framework. The first type includes those categories which describe planning, management, training and system operating procedures. Sources of data for these descriptions are planning documents, training outlines, procedural interviews with managers and advisors, and direct observation of service provision. The purpose of such description is to provide an historical record of how the service was developed, how the training was conducted and how the system operates to diagnose needs and link responsive services to those needs. Once these descriptions are completed they are relatively fixed, requiring updating only when modifications are made or new services are planned and provided. Part I of the Final Report contains the libraries' characterizations of management structure, service delivery procedures and training program design.

The second type includes categories which describe learners, services, service effectiveness, service cost and the value of promotional efforts. Data sources for these categories are the learners, and the advisors; descriptions result from records kept by advisors on learners as they progress through their learning projects. This information is dynamic, continually changing as each new learner is added to the service. Advisors use such information to assist them in working with individual learners; managers and policy makers use accumulated statistics on service effectiveness and cost

to assist them in decisions on allocation of personnel, level of service, and need for additional training. It is this second set of data categories which has formed the basis for the common data collection and evaluation system.

1. The Common Data Collection and Evaluation System

The first step in developing the common data collection system was to design a set of standardized forms to be used by each library. The selection of specific questions to be included on these forms was guided by the evaluation framework and by the experiences of the libraries in collecting data in these categories during service testing. Seven forms resulted: Interview, Progress Report, Progress Evaluation Interview, Materials Worksheet, Referral Worksheet, Learner's Evaluation, and Advisor's Evaluation (see Appendix B). The Interview, Progress Report and Progress Evaluation Interview forms were designed around the steps taken by the advisor in working with the learner. The Interview form was used in the first learner contact, the Progress Report was used for all subsequent contacts, the Progress Evaluation Interview was used at various stages in the learning project to obtain interim assessments of service usefulness from the learner. The purpose of the Materials and Referral Worksheets was to provide a detailed record of specific materials given and actions taken for each learner. The Learner and Advisor Evaluation forms were used to obtain final assessments of completed projects.

The second step in developing the common data collection system was to create a set of computer programs to summarize and analyze the data collected by the libraries. The decision to use a centralized computer analysis was based on three reasons. First, it allowed each library to directly compare its results with the results obtained for all of the libraries. Second, it provided a means for examining possible relationships between learner characteristics and the types of learning projects selected. Such analysis would be difficult to accomplish on a manual basis. Third, by combining results from all libraries, it provided a more extensive data base for characterizing the

learners, the learning projects, the services and the judged usefulness of services.

The specific categories of information included on the forms were grouped into four profiles for purposes of analysis: The Learner Profile, the Service Profile, the Institutional Profile and the Communications Profile. The Learner Profile corresponds to characterization of the learner in the evaluation framework, the Service Profile corresponds to characterization of service and service effectiveness, the Institutional Profile corresponds to characterization of service cost and the Communications Profile corresponds to characterization of the communications campaign. Table 1 presents the single and combined data categories used in developing the Learner Profile. These categories have been divided into six groups. The first group describes the learners in terms of demographic characteristics. The purpose of this analysis is to obtain a general picture of who the learners are in terms of sex, occupation, age and educational background, and to determine if they are residents of the areas serviced by the library. The second group deals with an analysis of combinations of demographic characteristics. In this analysis, male and female learners are compared on occupation, educational level and age. Additionally, prior library use patterns (frequency) of learners are characterized and the possibilities of relationships existing between these use patterns and the demographic background characteristics of learners are examined. The third group of data categories is project characteristics; these categories describe learning goals, areas of interest, learner's background in the selected area of interest and the kinds of changes made by the learner in the scope of the project as it progresses. This description provides an overview of project choices made by the learners and shows the relative frequency with which learners are selecting each learning goal and each interest area. The fourth group contains combinations of data categories which examine the possibilities of relationships between learning goals, learning areas of interest and the demographic characteristics of the

Table 1. Adult Learner Profile

Data Categories	Questions
Demographic Characteristics (Separately) • Sex • Residence • Occupation • Age • Education	How are learners distributed on each characteristic (age, sex, etc.)?
Demographic Characteristics (Combinations) • Sex x Occupation • Sex x Education • Sex x Age	Do male and female learners have different occupations, educational backgrounds, age ranges?
• Project Library Use x Other Library Use • Project Library Use x Library Card	How many learners are new library users? How does library use relate to having a library card?
• Project Library Used x Occupation • Project Library Use x Education • Project Library Use x Age • Project Library Use x Sex	Is library use related to age, sex, occupation, education of the learner? Who are the new users?
Project Characteristics (Separately) • Learning Goals • Areas of Interest • Learners Background • Changes in Project Scope	How are learners distributed on each project characteristics?
Project and Demographic Characteristics (Combination) • Learning Goal x Area of Interest	Are learning goals and areas of interest related? (e.g., Learners with a credit goal have similar areas of interest that are different from learners with a vocational goal.)

Table 1. Adult Learner Profile (Continued)

Data Categories	Questions
Project and Demographic Characteristics (Combination) - Cont. • Learning Goal x Occupation • Learning Goal x Age • Learning Goal x Education • Learning Goal x Sex	Do demographic characteristics relate to selection of goal? (e.g., Do learners between 25-34 select similar goals that are different from goals selected by other age groups?)
• Area of Interest x Occupation • Area of Interest x Age • Area of Interest x Education • Area of Interest by Sex	Do demographic characteristics relate to selection of an area of interest?
Learning Style Characteristics (Separately) • Preferred Learning Method • Preferred Learning Location	How and where do learners prefer to learn?
• Type of Contact	How do learners contact service?
• Time Between Contacts (each visit)	What is the average time between contacts?
• Project Length	How long is the average project?
Style, Project and Demographic Characteristics (Combination) • Background x Number of Contacts	Do learners with no background need more contacts with the advisor than learners with some background?
• Age x Location • Age x Method	Does age relate to location and learning method? Do location and method relate?
• Education Location • Education x Method	Does education relate to method and location? Do learners with higher education prefer books more than learners with less education?

learner. The purpose of this analysis is to determine whether choices about learning projects can be predicted from a knolwedge of the demographic characteristics of the learner (e.g., does the age of the learner influence his/her selection of a learning goal?). The fifth grouping of data categories concerns the learners' preferred learning styles in terms of how they like to learn and whether they choose to contact the advisor in person or by telephone. The results of this analysis point to the relative demand for print media versus audio and visual media and to the number of learners preferring to use the library as opposed to the home or classroom as a place to do their learning. The last group in the learner profile deals with combinations of data categories which measure the possible relationships between preferred learning styles and the learner's demographic characteristics.

Table 2 presents the data categories included in the Service Profile. These categories are divided into five groups. The first group relates to service characteristics and contains information on the types of Advisory and Information Support Services provided by the advisor at each meeting with the learner. The purpose of collecting and analyzing these data is to develop a picture of how the services change as the learner progresses from the initial interview through various stages of his/her learning project. The second group of data categories concerns the learners' evaluations of specific referrals and materials. These evaluations are obtained by the advisor at the time the learner has finished with a piece of material or completed a referral appointment. The third group, relates to the learners' evaluation of advisory and information support services upon completion of the learning project. Here, the learner is asked to evaluate, on a five point scale of satisfaction, the usefulness of the learner-advisor relationship, the adequacy of support services, and the overall usefulness of the experience with the library in meeting his/her learning needs. These data are most important in measuring the acceptability and usefulness of the service. The fourth group deals with advisor

Table 2. Service Profile

Data Categories	Questions
Service Characteristics	
• Advisory Services Provided (each visit)	What advisory services are provided at the first, second, etc., meeting with the learner? Are goals being continually defined, content altered or do these changes occur in the beginning?
• Information Support Service Provided (each visit)	What is the frequency of each service? Does the frequency change as a function of the visit number? (e.g., more referrals in the beginning.)
Learners Specific Service Evaluations	
• Materials Useful	How does the learner feel about each piece of materials provided?
• Referrals Kept	How many referral appointments are made and how many are kept by the learner?
• Referral Usefulness	How do learners feel about each referral?
Learners Overall Service Evaluation	
• Learner Advisor Relationship	How do learners feel about advisor availability, comfort, communication and learning plan development?
• Information Support Services	How do learners feel about library hours, facilities, materials, study aids, referrals?
• Overall Satisfaction	Were learners satisfied, would they use service again, recommend it?
Advisors Specific Service Evaluation	
• Materials Available	What proportion of selected materials are available?

Table 2. Service Profile (Continued)

Data Categories	Questions
Advisor's Overall Service Evaluations	
• Learner Advisor Relationship	How do advisors feel about availability, comfort, communication and plan development?
• Information Support Services	How do advisors feel about materials, study aids and referrals?
• Overall Satisfaction	How do advisors generally feel about services they have provided to each learner?

evaluations of specific material availability. These evaluations are made at the time material is selected to meet a learner's needs. Materials that are not available are further characterized by "Not in the Collection" or "Not on the Shelf." The fifth group includes advisor evaluations submitted at the end of a learning project. The advisor evaluation categories are the same as those presented to the learner. These evaluations provide a general characterization of the advisors' satisfaction with the services they are providing.

The Institutional Profile is shown in Table 3. The only data category included in the Institutional Profile is time to complete each interview with a learner. The purpose of this information is to provide a firm basis for determining the amount of contact time required for a learner. Plans are presently being carried out to expand this profile and include time measurements on other advisor tasks such as searching for materials or preparing study aids. Obtaining data on material cost still poses a problem. This is due to the fact that there are no clear criteria for separating project costs from library costs.

Table 3. Institutional Profile

Data Categories	Questions
Advisor Time	
• Time to Complete Each Interview	How much of the advisor's time is devoted to interviewing the learner? Is more or less time required as the project progresses?

The Communications Profile is pictured in Table 4. The first part of this profile is concerned with the relative effectiveness of each form of service publicity in attracting learners to the service. Some examples of publicity include newspapers, radio, TV, in-library displays. The second part of the profile examines possible differences in the kinds of learners attracted by each medium. This is accomplished through an analysis relating demographic characteristics to promotional media. Information on frequency of use of each medium has not been included because these data have been difficult to obtain.

Table 4. Communications Profile

Publicity Effectiveness (Separately)	
• Promotional Media	How many learners are attracted by each publicity medium?
Publicity Effectiveness and Demographic Characteristics (Combination)	
• Promotional Media x Occupation • Promotional Media x Education • Promotional Media x Age • Promotional Media x Sex	Is there a relationship between promotional media and learner demographic characteristics? Are different age groups attracted by different media? Are learners with higher education attracted more often by newspapers than learners with less education? Etc.

2. Management of the Common Data Collection and Evaluation System

The Research Study Group, composed of one representative from each of the nine libraries, was formed to oversee the operation of the data collection and evaluation system. These individuals were responsible for gathering information from advisors, coding information for computer input, analyzing computer output and interpreting results as they applied to local situations. The coded information provided by the libraries was processed and verified by the representative at the Salt Lake City Library who also worked closely with a programmer from the University of Utah in developing the computer analysis. Data were summarized and analyzed on the computer every three months. The outputs of this analysis included:

- An aggregate summary of all nine libraries for each three month period.
- An aggregate cumulative summary of all nine libraries combining three month periods to provide a 6-months, 9-months and 12-months summary.
- An individual summary for each library for each three month period.
- An individual cumulative summary for each library combining three month periods to provide a 6-months, 9-months and 12-months summary.

Following each quarterly printout, the Research Study Group met to discuss procedures and results. These meetings led to modifications in forms, coding procedures and computer printout formats.

One of the primary functions of the Research Study Group was to show how the data could be used by the libraries as inputs to policy decisions. This was accomplished through preparation of reports to be used by library administrators in making decisions about the future of the service.

III. AGGREGATE RESULTS

This section of the report presents an analysis of the data collected by the nine libraries between July of 1975 and July of 1976. During this time data have been entered on 934 learners and 969 projects; 35 learners have initiated more than one learning project. A learner is defined as an individual who uses the services of a learner's advisor to diagnose learning needs and to develop a learning plan. Adults contacting the advisory service who did not meet this definition were referred to other appropriate services in the library. No project data records were kept on these adults who numbered in the thousands.

The results will be discussed within the profile structure described in Chapter II. The Learner Profile will be presented first followed by the Service Profile, the Institutional Profile and the Communication Profile. The discussion will focus on the aggregate results across the libraries, however, differences between the individual libraries will be highlighted where appropriate. Differences in learner demographic characteristics reported by the libraries may be due to differences in population make up or emphasis in promotional efforts; differences in project characteristics may reflect variations in service emphasis. All percentages reported in the tables and figures are based on the number of learners making a response in a particular data category. The No Response rate ranges from zero to 17% with most data categories having less than 10% No Response.

A. The Learner Profile

1. Demographic Characteristics

Demographic data were collected on learners in five categories: sex, residence, occupation, age and education. The first part of the analysis presents a description of each of these demographic characteristics separately. The data on sex distribution show that 38% of the learners are males and 62% are females. A comparison of the individual libraries indicates that all

attracted more females with Baltimore attracting the highest relative percentage (73%) and Miami attracting the lowest (52%).

The results on learner residence show that 79% are residents, 14% are non-residents and 7% reside in the service area.* St. Louis has attracted the highest percentage of non-residents (32%) while Woodbridge and Salt Lake City attracted the highest percentage of "In Service Area" (20% and 19%, respectively).

The distribution of learners across occupational categories is pictured in Figure 1. The occupation with the highest percentage of learners is Other White Collar Worker (22%) followed by Housewife (21%), Unemployed (14%) and Professional (13%).

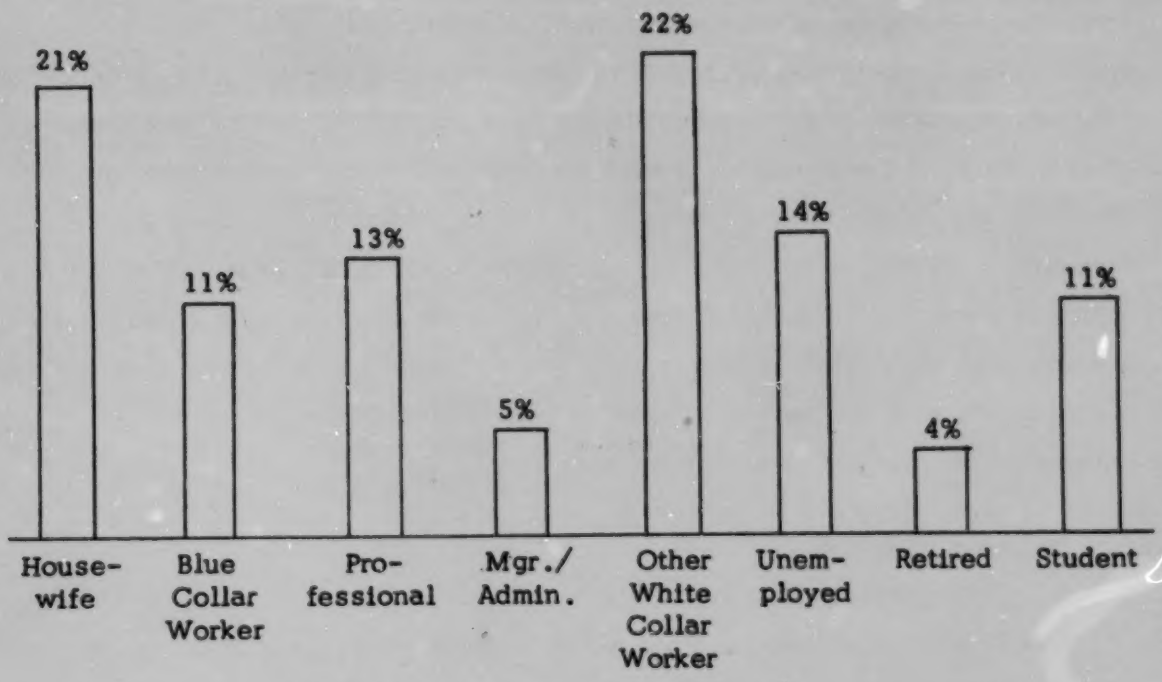

Figure 1. Occupational Distribution

*In Service Area: A contractual arrangement whereby individuals outside of the legal jurisdiction of the libraries are provided library services.

Comparisons of individual libraries on occupation show a variety of distributions.

- Portland has attracted the highest percentage of Blue Collar Workers (20%), while attracting no learners in the Manager/ Administrator category.
- Baltimore has attracted the highest percentage of Other White Collar Workers (36%) and the lowest percentage of Blue Collar Workers (3%) and Housewives (8%).
- Tulsa has attracted the highest percentage of Unemployed (32%).
- Salt Lake City has attracted the highest percentage of Manager/ Administrators and Professionals (30%).

The age distribution of learners is presented in Figure 2. It can be seen from this figure that 73% of the learners fall in the three age groupings between 18 and 44 with the largest single percentage of learners having ages of 25-34. All of the libraries have similar distributions with the exception of Miami which has 40% of its learners over the age of 44.

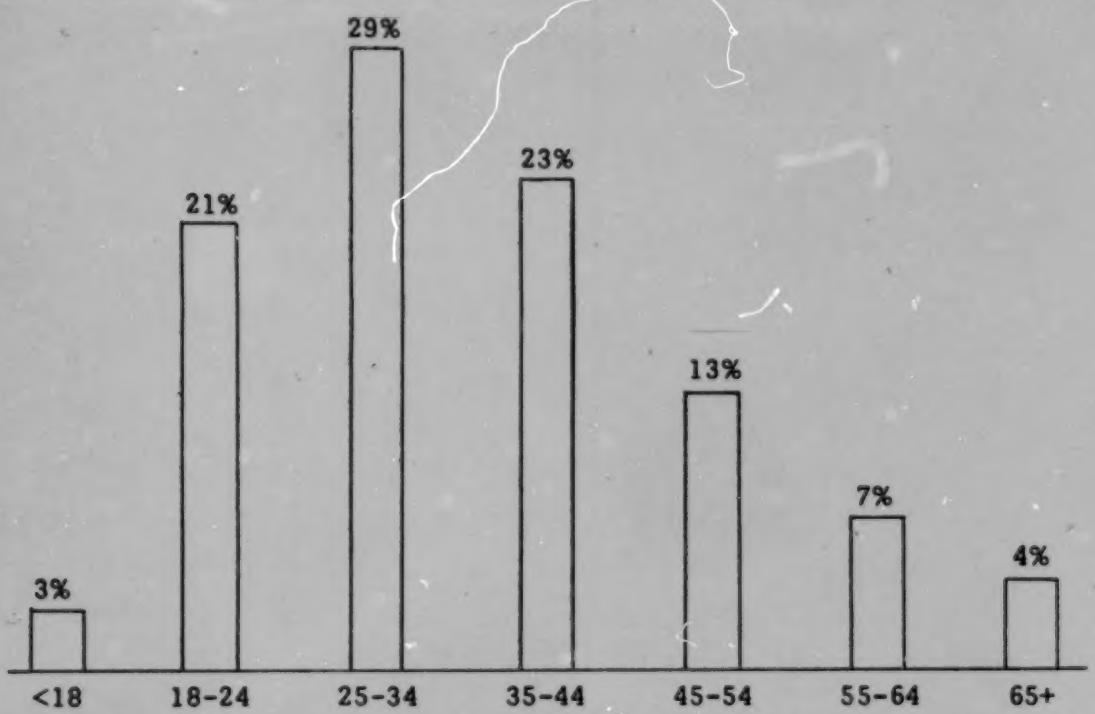

Figure 2. Age Distribution

Figure 3 shows the distribution of learners in terms of educational background. This distribution indicates that 62% of the learners are either high school graduates or have had some college experience. Examination of the individual libraries shows some distributional differences.

- Tulsa has the highest percentage of learners with some high school or less (46%).
- Woodbridge and St. Louis have the highest percentage of high school graduates (42% and 41%, respectively).
- Baltimore has the highest percentage of learners with some college experience (54%).
- Salt Lake City and Atlanta have the highest percentage with BA degrees or graduate work (38% and 31%, respectively).

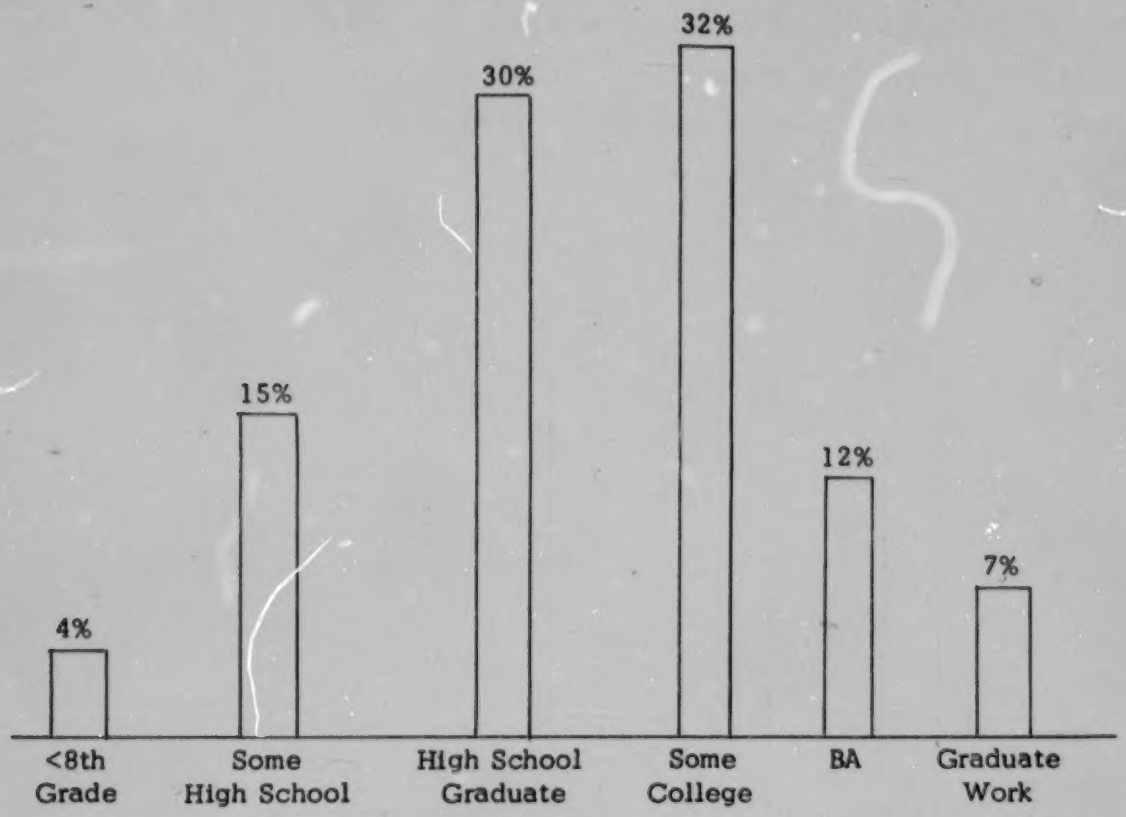

Figure 3. Educational Distribution

In summary, the analysis of single demographic characteristics has shown that there are more female learners, that learners most frequently have occupations of Other White Collar Worker or Housewife, that most learners are between 18 and 44 and that most have at least a high school education.

The second step in the analysis of demographic characteristics involves a comparison of male and female learners in terms of education, age and occupation. The purpose of this analysis is to determine if male and female learners have different backgrounds. Table 5 presents the results. The comparison of educational backgrounds shows both males and females with a high percentage of learners in the High School Graduate and Some College levels. Females, however, appear to be more concentrated than males in these two categories: 66% vs. 56%. With regard to the age comparison the results show males and females are similarly distributed with males having slightly more learners under the age of 24. The percentages obtained for occupation indicate substantial differences between the two groups. Males are more evenly distribution across occupations than females with the highest percentage in the categories of Blue Collar Worker, Unemployed, Other White Collar Worker and Student. Female learners are grouped in two occupations: Housewife and Other White Collar Worker. An additional analysis of males and females with regard to occupation is shown in Figure 4 which compares only those males and females who are employed. The results show females concentrated in Other White Collar jobs (58%) followed by Professional jobs (24%) and males distributed in Blue Collar jobs (34%), Other White Collar jobs (29%) and Professional jobs (27%). A Chi Square (χ^2) test of significance was computed for each relationship examined in Table 1. The results show a 99% probability that male and female learners are distributed differently in terms of educational background and occupation. The analysis of Age x Sex indicated no significant relationship.

Table 5. Comparison Between Males and Females on Education, Age and Occupation

	Male	Female
Education		
8th Grade or Less	5%	3%
Some High School	18%	14%
High School Graduate	23%	34%
Some College	33%	32%
BA	11%	12%
Graduate Work	10%	6%
Age		
Less than 18	4%	3%
18-24	25%	19%
25-34	29%	29%
35-44	21%	25%
45-54	11%	14%
55-64	5%	6%
65+	4%	4%
Occupation		
Housewife	1%	33%
Blue Collar Worker	20%	5%
Professional	16%	10%
Manager/Administrator	7%	3%
Other White Collar Worker	17%	25%
Unemployed	20%	10%
Retired	4%	4%
Student	14%	9%

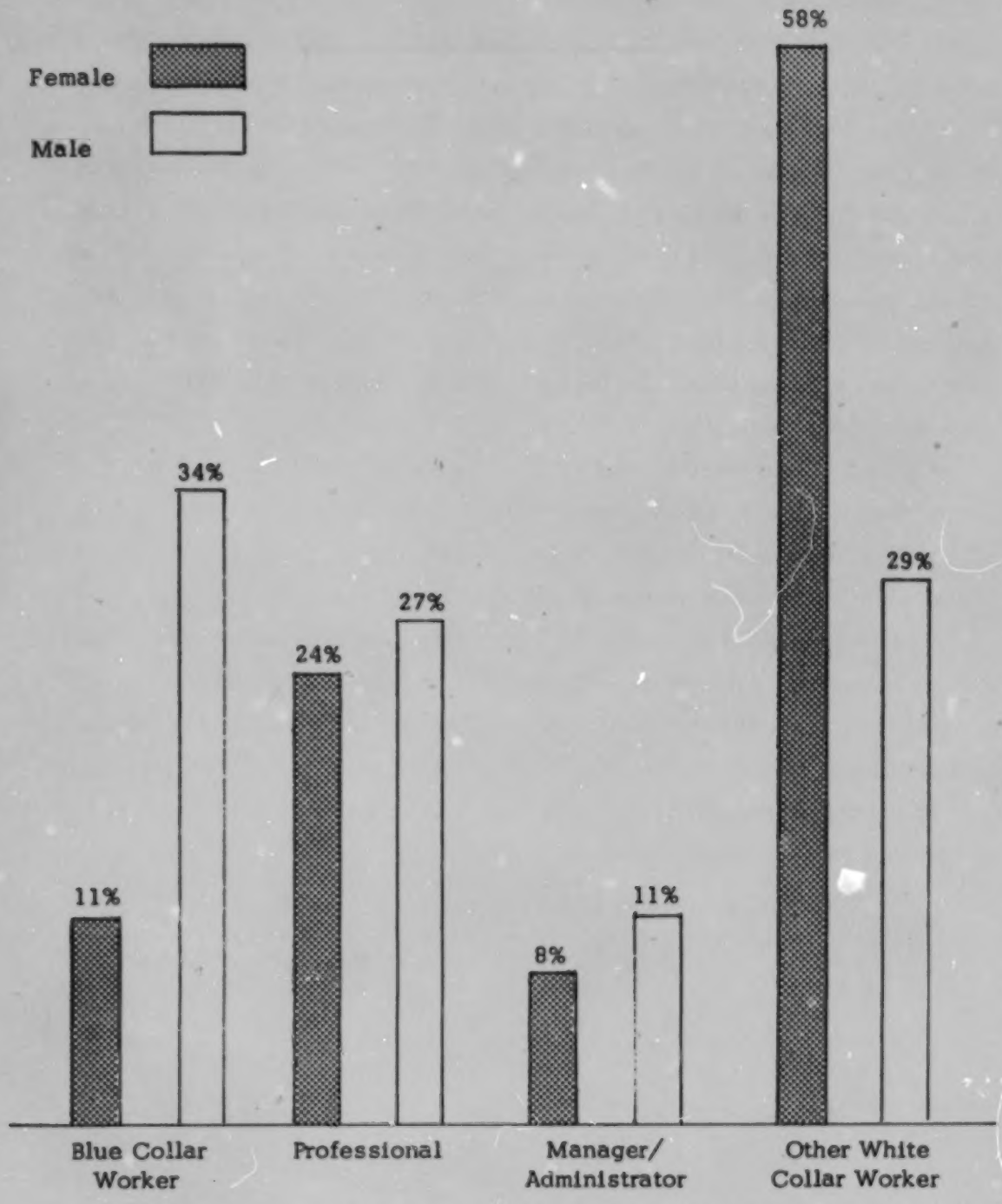

Figure 4. Comparison Between Employed Males and Females

2. Library Use Patterns

In order to develop a characterization of the library use patterns of learners prior to the initiation of a learning project, each learner was asked to indicate the frequency of use of the project library and other libraries. One of the purposes of this characterization was to determine the percentage of new library users attracted to the service. The frequency of use categories used in the data collection were Once or More A Month, Once or More Every Six Months, Once or More A Year, Less Than Once A Year and Never. For purposes of analysis, learners in the first two categories were considered heavy users and learners in the last two categories were considered light or new users. The results show:

- Heavy Library Users (Project library and/or other library), 77%
- Heavy Project Library Users, 67%
- Light or New Project Library Users, 26%
- Light or New Library Users, 15%

A second question concerning library use was how usage patterns relate to the possession of a library card. Table 6 presents these results. It can be seen from this table that as the frequency of prior use decreases the percentage of card holders decreases. It is interesting to note, however, that 10% of the heavy project library users do not have a library card and that 39% of the light or new users do possess a card.

Table 6. Library Card by Project Library Use

Project Library Use	Library Card	
	Yes	No
Heavy	90%	10%
Medium	56%	44%
Light	39%	61%

A third area of analysis regarding project library use involved the examination of possible relationships between frequency of prior use and the occupation, education, age and sex of the learner. Table 7 presents this analysis. The results for occupation show that Unemployed (35%) and Blue Collar Worker (25%) have the highest percentage of new project library users. Examination of the Once or More A Month category shows that four occupational groups have more than half of their learners using the project library at this level of frequency. These groups are Housewife, Professional, Other White Collar Worker and Student. The results for education indicate that learners with a background of Some High School have the highest relative percentage of new users (42%) when compared with other educational levels. Learners with Less Than Eighth Grade or with Graduate courses appear to use the library more frequently than other groups. The analysis of age shows that the highest percentages of new project library users are under 34 years of age. The comparison of male and female learners indicates a slightly higher percentage of males as new users. Each of these relationships was tested for statistical significance using the Chi Square. The results are as follows:

- 98% certainty that learners with different occupations have different library use patterns.
- 99% certainty that learners with different educational backgrounds have different library use patterns.
- 94% certainty that learners in different age groups have different library use patterns.
- 99% certainty that male and female learners have different library use patterns.

3. Project Characteristics

Project characteristics include learning goal, learners area of interest, learners' background in the area of interest and changes in the scope of the project as the learner progresses through a series of meetings with the advisor.

Table 7. Project Library Use Patterns Related to Demographic Characteristics

	Library Use				
	Once or More A Month	Once or More Every 6 Months	Once or More A Year	Less Than Once A Year	Never
Occupation					
• Housewife	55%	16%	4%	7%	18%
• Blue Collar Worker	40%	20%	9%	6%	25%
• Professional	56%	14%	8%	5%	18%
• Mgr./Admin.	41%	24%	12%	6%	18%
• Other White Collar Worker	57%	17%	6%	4%	16%
• Unemployed	35%	20%	4%	7%	35%
• Retired	49%	24%	6%	12%	9%
• Student	56%	12%	9%	6%	17%
Education					
• Less than 8th Grade	61%	18%	-	-	21%
• Some High School	32%	12%	7%	7%	42%
• High School Grad.	45%	20%	8%	9%	18%
• Some College	52%	19%	5%	5%	19%
• BA	63%	15%	5%	3%	14%
• Graduate Work	73%	11%	10%	3%	3%
Age					
• Under 18	44%	12%	8%	8%	28%
• 18-24	40%	17%	9%	8%	27%
• 25-34	51%	15%	5%	5%	24%
• 35-44	53%	20%	4%	4%	19%
• 45-54	58%	20%	9%	4%	8%
• 55-64	58%	15%	2%	10%	15%
• 65+	58%	18%	6%	9%	9%
Sex					
• Male	42%	19%	9%	7%	23%
• Female	55%	16%	5%	6%	18%

The distribution of learners on the various learning goal categories is presented in Figure 5. To gain specificity over previous analysis the general goal of personal development has been broken down into Increase Knolwedge and Increase Skill. The highest percentage of learners have selected goals involving educational credit (34%) followed by goals of increasing knowledge (28%) and changing or advancing in a vocational area (20%).

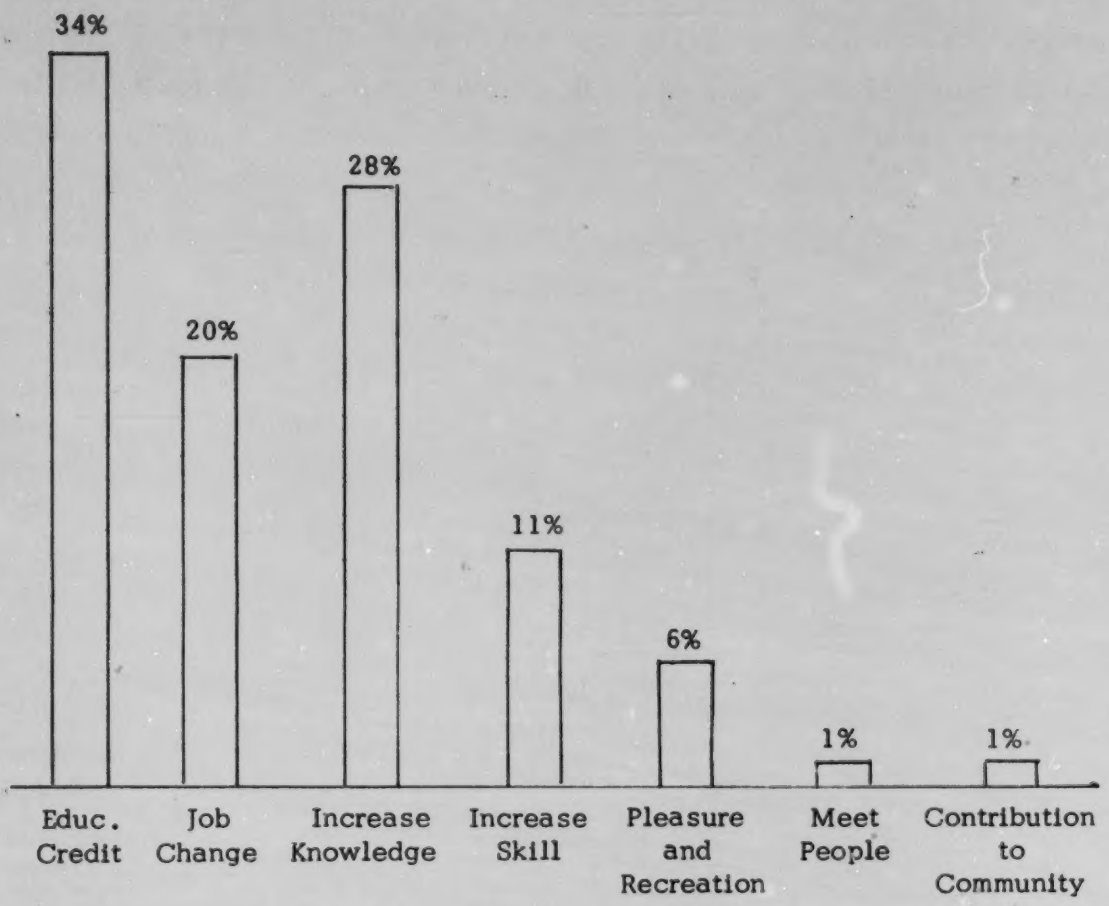

Figure 5. Learning Goal Distribution

Different service emphasis in the individual libraries has led to distributional differences in learning goals. Some major variations are listed:

- Baltimore and Woodbridge are emphasizing educational credit and have high percentages of learners selecting this goal (57% and 49%, respectively).

- Atlanta and Salt Lake City have the highest percentage of learners interested in increasing knowledge (55% and 44%, respectively). Additionally, Salt Lake City has only one learner with an education credit goal.
- Portland has the highest percentage of learners interested in increasing skill (23%).

The distribution of learners on selected areas of interest is shown in Figure 6. The two interest categories selected most frequently by learners are Social Science (29%) and Technology and Applied Science (25%). In the Humanities-related areas the range is from 1% for religion to 11% for languages. In order to achieve a more balanced picture, Pure and Applied Sciences were

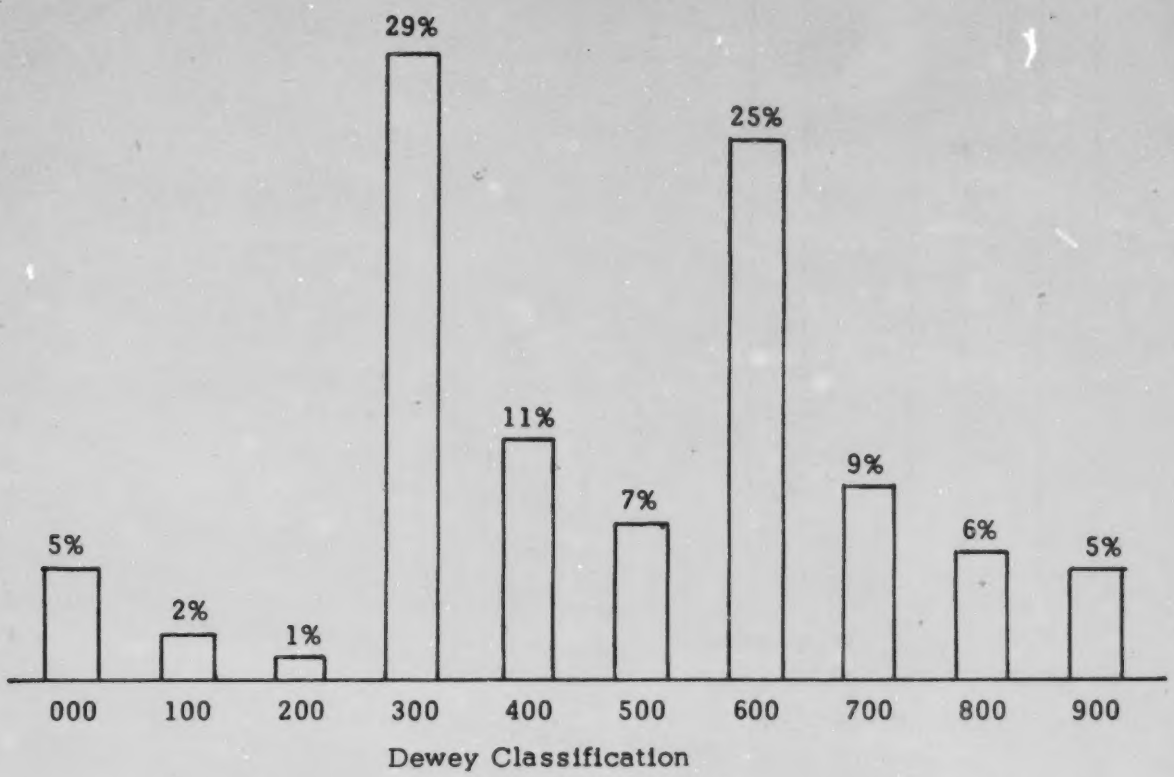

Figure 6. Areas of Interest Distribution

combined and the seven Humanities categories were added together. The resulting distribution shows:

Humanities, 39%

Pure and Applied Science, 32%

Social Science, 29%

These three categories are used in all other analyses involving area of interest. This has been done because of the small number of learners selecting a specific Humanities-related area.

The next analysis compares the learner's selection of learning goal with his/her selection of an area of interest. This analysis is designed to examine the possible relationship between goals and interests. Table 8 presents the results. It can be seen from this table that learners selecting educational goals focus in the Social Sciences (57%), that learners with job-related goals focus in the Pure and Applied Sciences (55%), and that learners with personal development goals of increasing knowledge, increasing skill and with goals of pleasure and recreation select Humanities most frequently (57%, 57%, 80%, respectively). The Chi Square test performed on this relationship showed a 99% certainty that learners with different goals pursue different areas of interest.

Table 8. Learning Goal by Area of Interest

	Learning Goal*				
	Educational Credit	Job Change	Increase Knowledge	Increase Skill	Pleasure and Recreation
Humanities	20%	21%	57%	57%	80%
Social Science	57%	24%	14%	10%	-
Pure and Applied Science	23%	55%	29%	33%	20%

*Meet People and Contribute to the Community have been left out of this analysis due to the small number of learners in those categories.

The learner generally selects an area of interest in the first meeting with an advisor. As the learning project progresses, and the learner begins to gain knowledge in the selected area he/she may find it necessary or desirable to alter the scope of the project. This may be particularly true for learners who have little or no background in the area selected; 24% of the learners have indicated no background, 72% some background and 4% extensive background. Table 9 shows the changes in project scope made by learners as they move from one progress meeting to the next. The percentages in this table are based on the number of learners participating in each progress meeting. Of the 969 projects, 56% required one or more progress meetings, 32% required two or more progress meetings, 20% required three or more progress meetings and 12% required four or more progress meetings. The results in Table 9 indicate that most learners making changes are narrowing the scope of their projects. However, the number of learners restructuring or modifying projects at any one meeting represents 30% or less of the learners participating in that meeting. A comparison of the quarterly data analysis on this question has shown that

Table 9. Changes in Project Scope

	Broader	Narrower	No Change
Progress Report 1	9%	21%	70%
Progress Report 2	7%	16%	77%
Progress Report 3	10%	14%	76%
Progress Report 4	6%	9%	85%

a significantly higher percentage of learners initiating projects in the first half of the year were making scope changes as compared to learners initiating projects in the second half of the year. There is no clear explanation for this shift. One possibility is that advisors are giving better guidance in the initial interview with the learner. Another interpretation, however, is that new advisors being added to the project do not have the proper training required to carry out the advisory process; to guide a learner from one stage to the next in his/her learning. This is an area that needs further exploration.

The final set of project characteristic analyses involve the examination of relationships between learner demographic characteristics, learning goals and selected areas of interest. The purpose of these analyses is to determine whether the learner's occupation, education, age, or sex has an influence on the selection of project goals and content. Table 10 shows the distribution of each occupational category across learning goals and content areas. The results indicate:

- Unemployed and Student learners select education credit goals (47% and 41%, respectively) and Social Science content (41% and 37%, respectively) more freqently than other occupational groups.
- Blue Collar Workers select goals involving vocational change or advancement (33%) and content in Pure and Applied Science (43%) more frequently than other occupational groups.
- Retired individuals and Professionals select goals of increasing knowledge (38% in both cases) more frequently than any other group. Retired individuals also show the highest percentages in goals of skill increase and pleasure and recreation (21% in both cases) and in content areas involving humanities (65%).

Chi Square tests of the relationships between occupation and learning goals and occupation and content area showed a 99% certainty that occupational groups are distributed differently on both learning goals and content area of interest.

Table 10. Occupation by Learning Goal and Content Area of Interest

	House-wife	Blue Collar Worker	Profes-sional	Mgr./ Admin.	Other White Collar Worker	Unem-ployed	Ret.	Stu-dent
Learning Goals								
Education Credit	29%	28%	30%	33%	31%	47%	15%	45%
Job Change	17%	33%	18%	19%	27%	17%	6%	14%
Increase Knowl.	29%	21%	38%	28%	26%	24%	38%	31%
Increase Skill	15%	12%	9%	14%	10%	9%	21%	7%
Pleasure and Recreation	10%	6%	6%	6%	6%	3%	21%	3%
Content Area of Interest								
Humanities	44%	32%	44%	42%	38%	34%	65%	37%
Social Science	25%	25%	19%	18%	29%	41%	14%	37%
Pure and Applied Science	31%	43%	37%	40%	33%	25%	21%	25%

Table 11 presents the distribution of learners at each educational background level across learning goals and content areas. The results of this analysis show:

- Learners with less than eighth grade or some high school education are most frequently interested in goals involving educational credit (61%; 60%) and in Social Science content (47%; 60%).
- Learners with some college show a high degree of interest in educational credit goals (38%) and in Humanities content (45%).
- Learners with BA degrees or with graduate experience select goals of increasing knowledge (49%; 47%) and Humanities content areas (48%; 42%) most frequently.

The results of the Chi Square test showed a 99% certainty that both goals and content selection of learners is related to educational background level.

Table 11. Education by Learning Goal and Content Area of Interest

	<8th Grade	Some High School	High School Graduate	Some College	BA	Graduate Work
Learning Goals						
Education Credit	61%	60%	30%	38%	11%	12%
Job Change	6%	14%	28%	19%	19%	18%
Increase Knowledge	9%	16%	23%	29%	49%	47%
Increase Skill	24%	7%	9%	9%	16%	12%
Please and Recreation	-	2%	9%	5%	5%	14%
Content Area						
Humanities	37%	15%	41%	45%	48%	42%
Social Sciences	47%	60%	20%	25%	22%	23%
Pure and Applied Science	16%	25%	39%	30%	30%	35%

The distribution of learners in each age group across goals and content areas is presented in Table 12. The major findings in this table are as follows:

- As age increases the selection of goals shifts from educational credit to increasing knowledge/skill and pleasure/recreation: Learners under 44 select credit most frequently while those over 45 focus in increasing knowledge.
- As age increases interest in the Humanities increases while interest in Social Science decreases: Humanities range is 25% for less than 18 to 51% for 55-64; Social Science range is 40% for 18-24 to 9% for 55-64.

The Chi Square tests showed a 99% certainty that age groups are distributed differently on these two project characteristics.

Table 12. Age by Learning Goal and Content Area of Interest

	<18	18-24	25-34	35-44	45-54	55-64	65+
Learning Goals							
Education Credit	38%	48%	34%	35%	27%	16%	6%
Job Change	21%	17%	21%	24%	24%	13%	6%
Increase Knowledge	28%	25%	30%	24%	28%	41%	47%
Increase Skill	10%	8%	12%	9%	10%	4%	23%
Pleasure and Recreation	3%	2%	3%	8%	10%	16%	17%
Content Areas							
Humanities	25%	37%	33%	40%	47%	51%	46%
Social Sciences	33%	40%	31%	25%	20%	9%	17%
Pure and Applied Science	42%	23%	36%	35%	33%	40%	37%

Table 13 presents the distribution of males and females on learning goals and content areas. The results for goals show very little difference in the selections made by each group. The data on content area, however, indicate that males are most interested in Pure and Applied Science (37%) while females select Humanities (43%) most frequently. The Chi Square test showed a 98% certainty that males and females select different content areas for their learning projects.

Table 13. Sex by Learning Goal and Content Area of Interest

	Male	Female
Learning Goals		
Education Credit	34%	35%
Job Change	21%	19%
Increase Knowledge	30%	28%
Increase Skill	10%	11%
Pleasure and Recreation	5%	7%
Content Areas		
Humanities	33%	43%
Social Science	30%	29%
Pure and Applied Science	37%	29%

4. Learning Style Characteristics

The characterization of learning styles involves a description of learner preferences for learning methods and locations, for type of contact with an advisor and for length of time between contacts. This type of information is useful to the advisor in developing a learning plan and of value to the policy maker in making decisions concerning the scheduling of advisors, the provision of space for learners and the type of service to emphasize.

Figure 7 presents the distribution of learners across learning methods. It can be seen from this figure that most of the learners prefer the use of books in their learning efforts followed by formal classes. It should be mentioned, however, that a separate analysis of the last three months of data collection indicates a slight shift away from books (55%) and into audio-visual materials (14%). A comparison of the individual libraries shows some differences.

- Woodbridge has the lowest percentage of learners preferring books (37%) and the highest percentage preferring formal classes (42%). This may be a function of their service emphasis on educational credit.
- Salt Lake City has the highest percentage of learners with a preference for audiovisuals (25%).

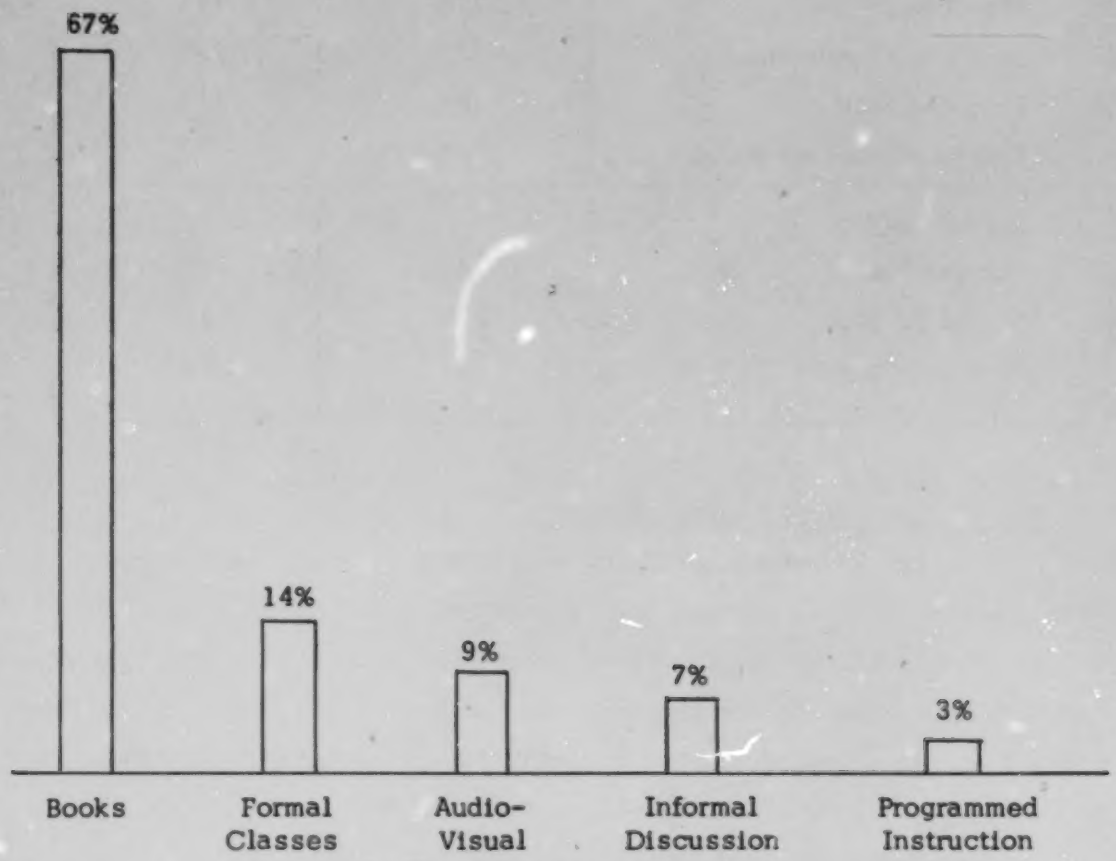

Figure 7. Learning Method Distribution

The distribution of learners on preferred learning location is shown in Figure 8. The results indicate that most learners prefer to learn at home. An examination of the data for the final three months shows a trend away from the home with less than half of the learners selecting this location. Preference

for the library was indicated by 27% of the learners during this time period.

A comparison of the individual library distributions shows:

- Miami has the highest percentage of learners preferring the library (42%) while Woodbridge has the lowest (8%).
- Baltimore has the highest percentage of learners preferring the home (79%).
- Woodbridge and St. Louis have the highest percentage of learners preferring the classroom (36%; 32%).

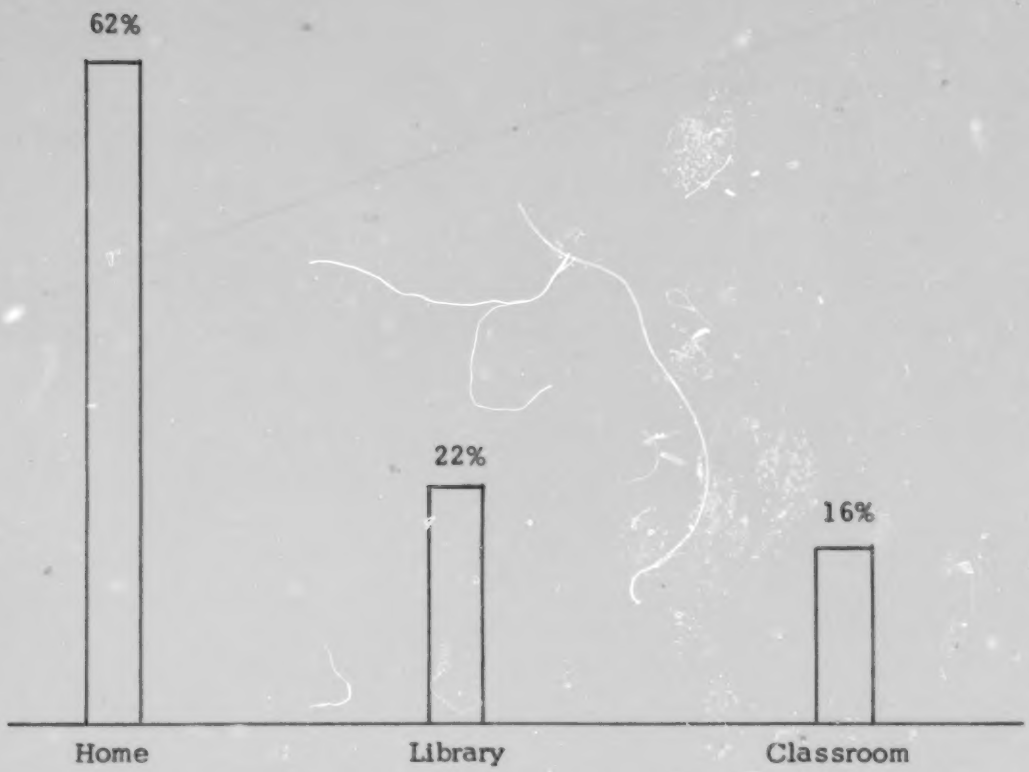

Figure 8. Learning Location Distribution

A further analysis of preferred learning methods and locations was conducted to determine whether the learner's age or education influenced these

choices. The results of the analysis for age and method show that learners 55-64 prefer audiovisuals (15%) more than other groups and that learners over 65 prefer informal discussion (19%) more than other groups. The findings for age and location indicate that learners over 65 (48%) select the library as a place to do their learning more frequently than learners of other ages.

The analysis of education level and learning method shows that educational level has little influence in the selection process. The only point of interest is that learners with less than an eighth grade education indicated the greatest preference for audiovisuals (22%). The major finding with regard to education and learning location is that as educational level increases the home is selected more frequently.

The final set of learning style characteristic analyses focuses on the type of contact the learner makes with an advisor, the time between contacts and the length of time to complete a project. Table 14 shows the type of contact used by learners in the initial interview and the first four progress meetings. It can be seen from this table that most contacts are made In Person. Telephone contacts appear to increase in the first progress meeting and then decrease for each subsequent meeting.

Table 14. Type of Contact

	In Person	By Phone	Correspondence
Interview	78%	22%	-
Progress Report 1	60%	35%	5%
Progress Report 2	64%	30%	6%
Progress Report 3	70%	27%	3%
Progress Report 4	81%	19%	-

Table 15 presents the means and medians for number of days between visits. In all cases the median is smaller than the mean indicating a greater number of learners at the lower end of the range. At the present time 39% of the 969 projects have been completed. The median time for these completed projects is 20 days, the mean time is 52 days and the range is 0 - 412 days.

Table 15. Time Between Visits
(In days)

	Mean	Median
Interview - Progress Report 1	42 days	16 days
Progress Report 1 - Progress Report 2	37 days	20 days
Progress Report 2 - Progress Report 3	40 days	20 days
Progress Report 3 - Progress Report 4	21 days	8 days

B. The Service Profile

1. The Services

Advisory and Information Support Services are provided to the learner at each contact with an advisor. Advisory Services are designed to aid the learner in developing a plan of study while Information Support Services involve the provision of materials, the making of referrals and the creation of study guides to support the implementation of the learning plan. It is possible for a learner to receive more than one service of each type at any meeting. Table 16 describes the provision of Advisory Services. The percentages in this table are based on the number of times the service was provided divided by the number of learners participating in the meeting. The results show that in the initial interview the program is explained to most of the learners (81%), assistance in goal definition is given to slightly less than half and scope and plan development help is given to slightly more than one-third.

As the meetings progress the most frequently offered service is plan development. The large increase in this service during the third and fourth progress meetings is primarily due to activities at the St. Louis Public Library where group activities are being offered to independent learners. If St. Louis is removed from the analysis the results show 44% of the learners receiving plan assistance in the third progress meeting and 46% receiving this assistance in the fourth meeting. The percentage of learners receiving no advisory services ranges from 9% in the initial interview to 43% in the second progress meeting.

Table 16. Advisory Services: Percentage of Learners Receiving Each Service

	Number of Learners	Explain Program	Define Goals	Define Scope	Develop Plan
Interview	969	81%	48%	37%	38%
Progress Report 1	546	10%	24%	18%	40%
Progress Report 2	307	5%	20%	13%	40%
Progress Report 3	190	5%	16%	12%	50%
Progress Report 4	115	4%	14%	14%	57%

The Information Support Services provided to learners at each meeting are presented in Table 17. Here, again, percentages have been computed by dividing the number of services given by the number of learners participating in each meeting. The support service most frequently offered is provision of material followed by gathering information and making referrals outside the library. In general, support services appear to decrease from meeting to meeting with the exception of preparing reading lists and referring learners to other locations or individuals inside the library. The percentage of learners receiving no support services ranges from 12% in the initial

interview to 18% in the fourth progress meeting. A comparison of individual library service distributions shows:

- St. Louis has the highest percentage of learners receiving referrals inside the library. In the initial interview 47% of their learners receive this service. Additionally, St. Louis has the highest percentage of learners receiving resource lists from the second progress meeting to the fourth progress meeting.
- Miami has the highest percentage of learners being referred outside the library in the initial interview (44%).
- Denver has the highest percentage of learners receiving study guides in the initial interview (17%).

The high percentage of resource lists and inside referrals provided by St. Louis is associated with their group activities. If St. Louis is removed from the analysis for progress reports two through four the results show that resource lists are provided to 4% of the learners in the second progress meeting and 3% of the learners in both the third and fourth progress meetings while inside referral is given to 5% in the second progress meeting, 3% in the third progress meeting and 8% in the fourth progress meeting.

Table 17. Information Support Services:
Percentage of Learners Receiving Each Service

	No. of Learners	Provide Mat.	Refer Out-side	Refer In-side	Gather Inform-ation	Provide Study Guide	Provide Resource List
Interview	969	69%	22%	14%	34%	8%	8%
Prog. Rpt. 1	546	58%	15%	11%	27%	6%	10%
Prog. Rpt. 2	307	49%	11%	13%	26%	5%	11%
Prog. Rpt. 3	190	44%	7%	16%	30%	5%	15%
Prog. Rpt. 4	115	41%	7%	26%	29%	4%	23%

2. Service Evaluation

Both learners and advisors have provided service evaluations on specific materials, on the general usefulness of the advisor-learner relationship and on the overall value of the Information Support Services. Specific evaluations of materials are given throughout the learning project while general evaluations occur when a project reaches completion.

Table 18 shows advisor evaluations of specific material availability. Materials are divided into three classes: Print Media, Visual Media, Audio Media, and most of the material falls into the Print Media class (97%). The results indicate that a high percentage of material in each class was found to be available.

Table 18. Availability of Specific Materials

	No. of Materials	Available	Not Available	Not In Collection
Print Media	2284	87%	10%	4%
Visual Media	53	100%	-	-
Audio Media	33	91%	9%	-

Table 19 displays the learners' evaluations of specific materials. The percentages in this table are based on the number of materials that have been evaluated. The percentage of unevaluated materials is 26% for Print Media, 17% for Visual Media, 6% for Audio Media and 25% for Study Aids. It can be seen from Table 15 that learners found most of the materials useful in supporting their project efforts: the range is 73% for Visuals to 97% for Audio materials. The low percentage appropriate for Visual Media is a result of evaluations from one library; all other libraries received evaluations of 100% useful for this media category.

Table 19. Usefulness of Specific Materials

	No. of Materials Evaluated	Appropriate	Not Appropriate
Print Media	1699	84%	16%
Visual Media	44	73%	27%
Audio Media	31	97%	3%
Study Aids	91	92%	8%

Learner and advisor evaluations of completed projects are shown in Table 20. These evaluations are presented in three general areas: Learner-Advisor Relationship, Information Support, and Overall Satisfaction. The specific categories under Learner-Advisor Relationship examine issues of learner and advisor comfort, ease of communications, the availability of the advisor when needed by the learner and the effectiveness of assistance given by the advisor in project plan development. Categories included in the Information Support area concern questions of the adequacy of library hours and facilities, the availability and usefulness of selected materials and the effectiveness of study guides and referrals. Overall Satisfaction relates to the general feelings of learners and advisors concerning the usefulness of all services in meeting the needs of the learner. Both learners and advisors were asked to rate completed projects on each of these questions using a five point scale. The points on the scale were labeled "Always", "Often", "Sometime", "Seldom" and "Never". For purposes of analysis "Always" and "Often" were combined as Satisfactory, "Sometimes" was considered as Uncertain and "Seldom" and "Never" were combined as Unsatisfactory. The table shows that learners are more positive than advisors in all evaluation categories. A comparison of advisor evaluations for the first and

Table 20. Learner and Advisor Evaluations

	Satisfactory	Uncertain	Unsatisfactory
Learner-Advisor Relationship			
• Advisor Available			
- Learner	93%	5%	2%
- Advisor	90%	8%	2%
• Comfort			
- Learner	95%	3%	2%
- Advisor	86%	12%	2%
• Communications			
- Learner	92%	7%	1%
- Advisor	84%	14%	2%
• Plan Help			
- Learner	86%	10%	4%
- Advisor	67%	24%	9%
Information Support			
• Library Hours			
- Learner	95%	4%	1%
• Library Facilities			
- Learner	90%	8%	2%
• Materials Available			
- Learner	77%	17%	5%
- Advisor	67%	24%	9%
• Materials Useful			
- Learner	83%	13%	4%
- Advisor	67%	27%	6%
• Study Guide Useful			
- Learner	88%	8%	4%
- Advisor	71%	25%	4%
• Referral Useful			
- Learner	88%	8%	4%
- Advisor	74%	15%	11%
Overall Satisfaction			
-Learner	91%	6%	3%
- Advisor	63%	21%	16%

Note: Percentages based on 196 learners and 379 advisors. Study guides evaluated by 100 learners and 130 advisors; referrals evaluated by 76 learners and 108 advisors.

second six-month periods, however, shows advisors becoming more satisfied in every area. Learners appear to be most satisfied with the comfort of the learner-advisor working relationship (95%) and least satisfied with material availability (77%) while advisors show most satisfaction with their availability to the learner (90%) and are least satisfied with learning plan development (67%), material availability (67%) and material usefulness (67%). On the question of overall satisfaction, 91% of the learners gave positive ratings as compared to 63% of the advisors.

Learners completing projects were also asked if they would use the service again and if they would recommend it to a friend. The results show that 92% would use the service again and that 98% would recommend it to a friend.

The satisfaction levels of both learners and advisors shows the service is perceived as useful. The finding that advisors are becoming more positive may indicate an increase in both competence and confidence in helping the learner meet his/her learning needs effectively.

C. The Institutional Profile

The purpose of the Institutional Profile is to provide data to policy makers on personnel time and cost and on material cost. At the present time the only item included in this profile is the advisor time involved in conducting an interview. There are plans to expand this profile in the future.

Table 21 shows the means and medians of advisor time spent in each meeting with the learner. It can be seen that both the means and the medians decrease after the initial interview. The longest time associated with conducting an interview was three hours.

Table 21. Time to Complete An Interview
(In Minutes)

	Mean	Median
Interview	33	25
Progress Report 1	16	10
Progress Report 2	16	12
Progress Report 3	16	12
Progress Report 4	20	15

D. The Communications Profile

The purpose of the Communications Profile is to assess the relative effectiveness of a variety of media in attracting learners to the service. This profile contains nine sources of publicity: two inside the library and seven outside the library. The two sources inside the library are the librarian and library displays including posters and brochures. Three of the sources used outside the library are the mass communication media of radio, television and newspapers. The promotional efforts on radio and television involved short commercials for the service designed by the National Office and interviews with library staff participating in the project. Promotions in the newspapers were generally based on discussions with staff and described the kinds of learners and learning projects associated with the advisory service. Other outside library publicity sources include Community Displays, Community Outreach, Word of Mouth and Another Agency. Community Displays consisted of bus cards, posters, brochures and billboards, while Community Outreach involved lectures to community groups. Publicity from Another Agency was usually in the form of a referral from a local educational institution.

Presenting the aggregate results for the Communication Profile does not provide a clear picture of the relative effectiveness of the various media.

Problems arise because each library conducted an individualized publicity compaign: some libraries did not make use of radio and television while others did not use community displays. Additionally, it has been difficult to obtain information on the frequency of occurrence of radio and television coverage. Therefore, a television station in one area may have presented a commercial five or six times more often than a television station in another area. As a result of these problems, communications efforts can be more effectively evaluated on a library-by-library basis. However, some general statements are possible based on aggregate data. First, 43% of the learners across all libraries are being attracted by in-library publicity efforts. Portland attracted the smallest percentage of learners inside the library (29%) while Atlanta attracted the highest percentage (53%). Second, a comparison of mass media effectiveness based on libraries that used all three media shows newspapers to be twice as effective as television and three times as effective as radio in attracting learners to the service. Examination of the Community Display data shows bus cards to be the most effective means for making potential learners aware of the service. The two libraries that used bus cards attracted 19% and 20% of their learners through this means; other efforts, such as billboards attracted less than 1% of the learners.

An analysis of promotional media by learner demographic characteristics shows the following relationships:

- In-library promotions are most effective for housewives (50%) and individuals with some graduate work (54%).
- Newspapers attract retired individuals (27%), individuals who are high school graduates (20%), individuals between 45 and 54 (23%) and females (19%).
- Word of Mouth is relatively more effective in attracting students (20%), individuals with less than a high school education (17%) and individuals between 25 and 34 (16%).
- Another Agency is relatively more effective for unemployed individuals (22%) and for males (16%).

E. Summary

The Learner Profile describes the demographic characteristics of the learners and relates these characteristics to project choices and preferred learning styles. The demographic description for the aggregate shows that there are more females than males, that the occupational categories with the highest percentage of learners are Housewife and Other White Collar Worker, that most learners are between 18 and 44 and that most have at least a high school education. Analysis at the individual library level shows distributional differences on all of these characteristics. These differences may be due to differences in population characteristics, differences in service target groups, or differences in promotional effort. Data on the relationships between these demographic characteristics and project choices and learning styles suggest the following key findings:

- Learners with different occupations select different learning goals and areas of interest.
- Learners with different educational background select different learning goals and areas of interest. Educational background, however, does not influence the selection of a learning method.
- Learners from different age groups select different learning goals and areas of interest. Age also influences the choice of learning method and learning location.
- Males and females have similar learning goals but select different areas of interest.

The specifics of these relationships, which are found in Tables 10 through 13, should provide guidance to advisors in working with new learners. Another important finding is that most learner contacts are in person. This has implications for facilities where learners and advisors can meet comfortably.

The Service Profile describes services provided and the evaluation of those services by learners and advisors. The results show that both advisory and information support services are being provided to learners from the initial interview through the fourth progress meeting. Learners have indicated

a high degree of satisfaction with all advisory services and most information support services. The lowest degree of learner satisfaction was with Material Availability (77%). Advisor evaluations were generally positive but tended to show less satisfaction than learners. Data from the Service Profile have significant policy implications which will be discussed in the next chapter.

The Institutional Profile describes only the time required to complete an interview. The results show a median of 25 minutes for the initial interview and medians of 12-15 minutes for subsequent progress meetings.

The Communications Profile was established to assess the effectiveness of promotional media in attracting learners to the services. On the aggregate level it appears that outside library sources attract slightly more learners than in-library sources. Of the outside media, newspapers are the most effective. The analysis of promotional media by demographic characteristics shows that media are differentially effective for different groups of learners. These data should be studied in detail at the individual library level as an aid in determining future promotional efforts.

IV. POLICY CONSIDERATIONS

In general, the influence of research on basic library policy has been minimal, particularly in its application to questions of service. The Learners Advisory Service, from its origin, placed high priority on the development of an internal accountability system (Program Planning and Evaluation) through which the connections between service, research, and policy would be explored. One result of this focus was the creation of two key management groups: the Research Study Group and the Policy Study Group. The Research Study Group, composed of one representative from each participating library, was responsible for data collection and the development of policy recommendations from these data. The Policy Study Group, composed of the nine library directors, was responsible for making policy decisions based on data and recommendations supplied by the Research Study Group.

This section of the report discusses the general framework within which the nine libraries examined policy questions/issues arising out of their shared and individualized systems. The translation of research into policy is a difficult task. It requires that the research be specifically directed towards policy issues, it requires that decision makers have experience in the use of research results and it requires that comparable data be available on other aspects of the operations so that judgments involving the allocation of resources can be made. In the present situation, the libraries are faced with some problems in all these areas. First, not all important questions were asked in the beginning; some questions evolved as experience was gained with the service. Additionally, in certain cases needed information was not collected because it was difficult to obtain. Some examples are the frequency of use of various promotional materials or the time allocation of advisors to specific service tasks. Second, librarians have limited experience in interpreting research results for management purposes. Third, in most

libraries there are no comparable data describing other services (e.g., reference, children's services, etc.). This lack of data makes it impossible to say that the Learners Advisory Service is of more value and, therefore, should be given a larger proportion of the libraries' resources than another service. The problem is compounded by the fact that the measure of success of one service may not be the same as the measure of success for another service. Different criteria must be established for each service based on the nature and purpose of that service.

Given the above constraints there are still several questions that can be addressed by the common data collection and evaluation system which relate to policy issues. Members of the Research and Policy Study groups identified three important policy questions arising from the data system. These questions are:

- Is the service itself, on the national and local levels, viable in its present form?
- Is the cost of the service justifiable, given the level of demand?
- Is the data collection system at the individual library level providing sufficient information about the library, the service and the learners to make policy decisions, given the relatively few number of cases.

A. Service Feasibility

There are several specific questions which relate to services feasibility. These include: Are learners and advisors satisfied? Is information support available and sufficient? Is staff response sufficient? and Are library facilities adequate?

1. Learner and Advisor Satisfaction

Most learners appear to be satisfied with the service they have received: 91% have indicated overall satisfaction, 92% would use the service again, and 98% would recommend the service to a friend. Their evaluations

of the learner-advisor relationship range from 95% satisfaction with the comfort of the working relationship to 86% satisfaction with assistance in learning plan development.

The results for advisors show 63% indicating overall satisfaction and 67% feeling satisfied with assistance given in learning plan development. Most satisfaction appears to be with their availability to the learner (90%) and the comfort of the working relationship (86%). The low levels of overall satisfaction and satisfaction with plan development assistance may suggest that advisors feel unprepared and that more training is required. Another possibility is that advisors had high expectations concerning service delivery which are not being realized. This question should constitute an area of concern for policy makers.

2. Information Support Availability and Usefulness

The data do not present a clear pattern for any easy response to this question. Increasingly, learners are noting difficulties in obtaining materials needed to complete their projects, although the majority remain generally satisfied. Advisors continue to be unhappy with the general usefulness of materials available, and have pointed out serious gaps in the library's holdings.

The information supplied through the Program Planning and Evaluation system indicates that each library should undertake a detailed analysis of the information support and advisory services system in the following two areas: study-guides/reading lists, and referrals (both inside and outside of the library). There is a discrepancy of some magnitude between the perceptions of learners and advisors in these two areas. The comparison between the aggregate and quarterly data, reveals an increased reluctance on the part of advisors to refer learners outside the library, to tap community support resources. An important policy consideration for the library decision makers rests with the issue of the public library as a central community or "outreach" agency.

The implications of this question are important, as they affect all aspects of the library operation, particularly in the areas of recruitment, training and professional development.

3. Staff Response

The data show that advisors are providing both advisory and information support services to most learners throughout the duration of their projects. In the fourth progress meeting 70% of the learners are still receiving advisory services, primarily in the form of plan development assistance, and 82% are still receiving information support services. These data have been relatively constant from one quarter to the next. It is possible that services could be improved, particularly in the area of learning plan development. Both learners and advisors indicate the least satisfaction with this advisory service. Additional training in the skills and knowledges associated with the task of plan development might be considered by policy makers.

Some changes in the nature of service have been noted in the area of modifying or redefining project scope as the learner progresses through a series of meetings with the advisor. In the first quarter, 70% of the learners were making changes in the scope of their initial project plan while in the fourth quarter only 30% of the learners were making such changes. There are two possible interpretations of this finding. First, advisors are getting better at the task of assisting learners in the definition of project scope in the first interview; that is, in immediately helping the learner to define a manageable learning project. The second explanation is that advisors are not providing needed guidance throughout the learning project. This, interpretation suggests that advisors are slowly moving away from the advisory service concept back to a position of business as usual. If this second interpretation is correct then questions arise as to how to create more positive service attitudes in the advisors. These questions relate to such policy issues as the need for personnel incentive programs which offer rewards for

services well performed and which negatively re-enforce performances and attitudes judged less than professional.

4. Facilities

The data demonstrate that library facilities are adequate for the provision of the Learners Advisory Service. Learner evaluations of library facilities and hours show a satisfaction level of 90% and 95%, respectively. Additionally, the findings for preferred learning location indicate that only 22% of the learners prefer to do their learning in the library.

B. Service Demand and Cost

Over a twelve month period a large number of adults have made inquiries regarding Advisory Services. Of these many adults, only 934 have met the definition of an independent learner. This represents an average of 104 learners per library; the actual range is 65 to 181. The question being addressed by the Policy Study Group is whether this is a sufficient level of response to justify continuing the service. There are two factors to be considered in addressing this question. First, each library must specify a target demand level that demonstrates service success from the standpoint of the number of learners. Without this target it is impossible to determine if the demand level is sufficient. All participating libraries established targets of this type during the service testing phase; some of the targets were met, others were not. In situations where targets were not reached decisions were made that targets were unrealistic and should be altered. This experience led to many of the libraries taking a "wait and see" attitude during service implementation. The result has been a lack of criteria for measuring success in terms of numbers.

A second factor to be considered is that none of the libraries have developed or executed full-scale promotional campaigns. Until such an effort is initiated, it is unfair to judge the sufficiency of the demand for service. Each library has promoted the service, but these efforts have not been sustained. This is supported by two findings. The fact that sources inside the

libraries have been responsible for attracting 43% of the learners suggests that outside communications were not effective in reaching a large number of learners. Additionally, the percentage of new and light project library users attracted to the service has decreased from 36% in the first quarter to 25% in the fourth quarter indicating that outside library communications were becoming less effective over time. An important policy question is whether the library should devote the needed resources to a full-sclae publicity effort in order to determine the real service demand level in the community.

Although there are no aggregated data on service cost, some of the participating libraries are keeping records of advisor time. These time records can be translated into an estimate of personnel cost associated with serving one independent learner. However, since the service is still in an experimental phase, these data should not be used to make hard decisions. While experimentation is in progress, procedures are being altered and personnel must learn these procedures. Time records of these activities may not reflect the efficiency that is achieved once procedures are set. An additional problem of using cost and demand information for advisory service in making policy decisions about the future of the service is the lack of comparable data on other library services. These data are necessary to insure the most effective allocation of personnel across all library services.

C. Data System Effectiveness At the Individual Library Level

The data system provides a framework for obtaining information to be used by the libraries in operating the service and in making decisions about the nature of the service in the future. At the present time, some of the libraries do not have a sufficient number of learners to make effective use of all aspects of the data system. The system is useful with small numbers

of learners for single variable analysis such as age, sex, learning goal and learning method. Problems arise for the analyses which are designed to examine relationships between demographic characteristics and project characteristics or between demographic characteristics and promotional media effectiveness. These analyses divide the learners into a large number of groups; in cases where few learners are involved there may be several groups containing only one or two learners. However, as the libraries attract more learners and provide more service these analyses will take on greater meaning. The data system should not be considered only as a means for describing the past but as a tool for characterizing the future.

D. Conclusion

The general framework for this discussion is intended as a starting point in addressing policy issues. The library policy makers, once they are satisfied with the general context, must move toward the level of detail which will enable them to arrive at specific courses of action. This may require the use of supplementary information sources outside the common data collection system.

The following illustrations, which come from the individualized reports of the Research Study Group, are indicative of how far the nine public libraries have moved from basic research to policy-action considerations. They fall into one of three areas which collectively must interlock on any serious policy consideration – questions, recommendations and actions.

- Questions:
  - What procedures are limiting the involvement of staff in the delivery of this service? (Tulsa)
  - Is an acquisitions policy or organizational procedure inhibiting the development of the service? (Tulsa)
  - Is the Learners Advisory Service, in actuality, more important to the library to improve the overall performance of the librarians in traditional library functions? (Tulsa)

- Might we not experiment with more continuous efforts outside the library and reach more new users? (Enoch Pratt)
- Should publicity be prioritized in order to get more or different types of learners or different content areas of interest into the program? (Salt Lake City)

- Recommendations:
  - As 12% of our learners prefer AV materials we are thinking about the possibility of allocating 12% of our book budget to satisfy that expressed need. (St. Louis)
  - A People-to-People Index should be created. (Miami-Dade)
- Actions:
  - Several other services will be measured and evaluated using the processes learned through the project. (Woodbridge)
  - The Learners Advisory Service will be offered only by those library agencies who volunteer to participate. (Atlanta)
  - We tapped inter-library loan within the State and found several human resources we were unaware of. (Portland)

These illustrative questions, recommendations and actions are intended only to reflect the ways in which the data system has been used in the policy area; they do not begin to penetrate the wealth and range of policy activities undertaken by the nine libraries.

V. DISSEMINATION OF THE INNOVATION

The changes sought through project dissemination activities are basic to public library policy and are not easily brought about through the distribution of reports and the writing of journal and popular magazine articles. These activities have been carried out and continue into the present time. The project, however, was also seeking changes of long duration that would persist beyond the nine demonstration sites engaged in the present effort. The dissemination of the innovation, the Learners Advisory Service, for bringing about planned change in the current practices of public library service to adult independent learners required the application of a conscious and deliberate strategy of dissemination and the creation of a structure that would persist over time for guiding and implementing this strategy.

There are several factors concerning public libraries that must be considered in developing such a strategy. First, the present allocation of funds to the various interests and departments within a public library often conflicts with the alternative uses of these existing resources for a new general service that goes across all these interests and departments. Second, the Learners Advisory Service has generated additional threats to the morale of professionals who are comfortable with existing practices and a segmented departmentalized approach to service and clients. Third, the manner in which planning and evaluation is presently carried out typically does not provide an avenue for introducing innovations. Current library practices focus on acquiring, organizing and preserving collections of materials, practices that are rarely appropriately evaluated. Models to effect changes in the delivery of a responsive service to the individual are frequently hampered by a preoccupation with this function of warehousing and the provision of a mass service through brief reference interviews characteristic of the main or central library of large systems. Fourth, organizational problems in the public

library identify communications difficulties and role conflicts at points of exchange. The question of who talks to whom in disseminating the innovation and the roles that are assumed in the exchange demand a more direct approach that goes beyond merely providing information on the achievements of a given project.

A. Short Range Dissemination Activities

One of the most novel and important results of the National Project was the development of a model and strategy for disseminating the Learners Advisory Service. To meet the immediate need for interested public librarians to learn more about the service, the National Office decided to conduct a series of 24 one-day seminars across the country. The purposes of these seminars were:

- To provide decision makers in small and medium-sized libraries the opportunity to consider the possibility of a Learners Advisory Service in their own libraries.
- To review development of the national effort in Learners Advisory Service implementation.
- To present a description of the service for the small or medium-sized library, including provision for needs assessment, program planning and evaluation, and training.
- To provide basic understanding of the components of a Learners Advisory Service.

Small and medium-sized libraries were selected as the target because they represent a large proportion of the libraries in the country. The steps followed in the development and implementation of the seminars is pictured in Table 22. The first major task was the development of criteria for the dissemination model. Criteria were based on characterizations of small and medium-sized libraries and on a comparison of these characterizations with branch libraries providing a Learners Advisory Service. The second task was the construction of a dissemination model based on the identified criteria. The third task

involved the implementation of the dissemination model, through the conduct of seminars and the evaluation of these seminars by participants and by resource faculty.

Table 22. Seminar Development and Implementation Activities

Task	Steps
Develop Criteria for a Model of Dissemination	• Characterize small and medium-sized libraries. • Identify similarities between small and medium-sized libraries and branch libraries providing a Learners Advisory Service. • Develop criteria for dissemination model
Construct Dissemination Model	• Review and approval of model criteria by National Office and members of Research Study Group. • Construct dissemination model from selected criteria. • Review and approval of model by Policy Study Group
Implement Dissemination Model	• Appoint National Resource Faculty. • Select public libraries to expand service. • Schedule visits to selected libraries and conduct seminars. • Evaluate model and general dissemination efforts.

1. Planning and Conduct of Seminars

The seminar teams (Resource Faculty) were selected from five of the project libraries. Each team was composed of two individuals. Following extensive consultation, the decision was made to divide the country into five regions. Whenever possible, the regions were drawn around the locations of the seminar teams. The state was used as the natural geographical unit from which the participants would be invited.

It was decided, with some local exceptions, to seek the assistance of the state library agencies in setting-up the seminars. Each state agency was asked to express interest in co-sponsoring the seminar, to provide a list of individuals who should be invited to the seminar, and to suggest a local host sponsor. Once agreement was reached the state library agencies, local host sponsors and participants were sent a Fact Sheet which provided basic information on the seminar. This fact sheet described the national project, discussed the function of the seminars and presented details on administration and coordination. The overall response from both state library agencies and local host sponsors was exceptional. Clearly, without their cooperation the success of the seminars would not have been possible.

Each participant was asked to supply to the seminar leaders, in advance, the basic information on both their library and community. The primary purpose for requesting such information was to provide the seminar leaders with sufficient knowledge of their audience to allow for needed adjustments in the seminar approach. This information was centrally compiled by the National Office in order that an aggregate profile of 524 library descriptions would be available. For the most part, the aggregate library profile shows that the primary target group of the seminar was reached, with the majority of participants coming from small or medium-sized public libraries. Some encouraging

reasons given for attending the seminar were: interest in new forms of service (60%) and a desire to increase adult use of the public library (62%).

A Participant's Workbook was prepared by the seminar teams and made available to the participants at the seminars. This workbook included the basic components of Advisory and Information Support service along with a case study designed to be used during the course of the one-day seminar. In addition, a one-page statement of the goals and objectives of the seminar was presented. Each seminar was preceded by a 45-minute slide and tape presentation which provided an overview of the three-year national effort. The content of the seminar included both program planning and evaluation procedures for service design and the operation and effectiveness of the Learners Advisory Service for assisting adult independent learners.

2. Seminar Evaluations by Participants

At the conclusion of the seminar each participant was requested to complete a questionnaire assessing both the content and format used to describe the Learners Advisory Service; 468 responses were received. Complete data were not obtained due to the fact that many participants did not answer or understand all of the questions and others left the seminar prior to completion.

The overall results of the questionnaire were positive and encouraging; they confirm the belief that there is extensive interest in learning more about the Learners Advisory Service. The favorable assessments demonstrated that practicing librarians, who are well-prepared, can effectively and skillfully conduct all-day seminars on extremely complex subject matter before peer groups.

Specifically, 90% of all the participants indicated that they received a basic understanding of the Learners Advisory Service and 86% believed that the interactions and roles of the advisor, learner and learning project were made clear through the seminar. With regard to the design and mechanics of

the information support services only 58% of the participants indicated that they had obtained a clear understanding. This was the smallest positive response in the evaluation and suggests that more attention should be devoted to discussing these services.

In response to a question on training, 77% of the participants said that they could foresee areas in which staff would need training in order to develop a Learners Advisory Service. Given the many responses to the Learners Advisory Service concept during the early stages of the National Project that librarians were already providing this service, the 77% response, perhaps more than any other, suggests that the objectives of the seminar were essentially reached.

Only 25% of the participants felt it was definitely feasible to establish a Learners Advisory Service in their library, while 62% indicated that more time was needed to consider the questions. Just five percent responded "no" to the question of feasibility. It took the nine public libraries nearly three years to implement the Learners Advisory Service, consequently, the response on feasibility was very encouraging for it reflects the balanced and realistic approach taken by the seminar leaders.

3. Summary

We know of no parallel situation in the field where attempts were made to systematically disseminate the pros and cons of project results in face-to-face contacts to a wide range of individuals prior to the completion of the project. Over 500 library decision makers were exposed to a one-day presentation describing the service and reviewing the national project results. Further, these decision makers were presented with a suggested model of a Learners Advisory Service for the small and medium-sized public library. In addition, each participant received various materials, including workbooks, reports and special bibliographies.

B. Long-Range Dissemination Activities: Consortium for Public Library Innovation

During the last six months the nine participating public libraries, working through the Policy Study Group, concentrated their attention on the critical question of continuity beginning July 1, 1975: Should an action be taken by the libraries to form a network of experimental public libraries? As one of the library directors put it: "We now have the expertise, talents, and resources to become a national network, capable of providing consulting, planning, training, information-sharing and other support services that meet expressed needs of services."

In February of 1976, the nine project libraries and the Minnespolis Public Library were asked to form a consortium by the National Office. In June of 1976, the Consortium for Public Library Innovation was established. Briefly summarized, the Consortium has committed itself to the following major activities:

- Overall improvement of the Learners Advisory Service through systematic research, experimentation and dissemination.
- Research on library service and management problems and the implication of these requirements for library school curriculum modification.
- Development of a prototype evaluation and data system for planning, monitoring and managing the various functions of public libraries.
- Sharing of planning, training and evaluation talent with other libraries.
- Dissemination and expansion of the results of consortium activities and research.

Various audiences will be interested in the results obtained from the experimental work of the Consortium and the findings will be specifically directed to directors of public libraries, librarians providing in-depth service, professors of library science and researchers, and policy makers in local governments and community agencies.

VI. CONCLUSIONS

There are several important outcomes of the project. First, the successful development and implementation of the Learners Advisory Service concept has generated increased attention to the need for providing more and better quality services to adults through the public library. Nine libraries have experimented with the provision of in-depth advisory and information support services to adults interested in learning outside of a formal educational setting. These services have attracted 934 learners in the past year, 216 of which are light or new project library users. The results of evaluations made by learners completing projects indicates that 91% were overall satisfied with the services and that 92% would use the service again for a new learning project. These findings suggest that the service is operating effectively in support of the learner. This success has led to interest on the part of other libraries in developing more effective service programs for adults. The response of dissemination seminar participants in desiring to explore new service alternatives is evidence of this interest.

A second outcome of the Learners Advisory Service was the successful integration of the service with Program Planning and Evaluation Management. This integration has emphasized the responsibility of the public library for operating in a manner accountable to those who help support the institution. The structure of the Program Planning and Evaluation process has demonstrably moved the library management operation in the direction of joint decision making based on the acceptance of major input from those whose experience, training and involvement provides expertise to the decision under consideration. Through the use of a common data collection and evaluation system the participating libraries demonstrated a willingness to replace shared ignorance with an objective information base for decision making. As a result of this system a wealth of information has been compiled by the nine libraries, much of

which is specific to their local situations. Continued analysis and interpretation of these data should provide additional insights for the profession in the months to come. The results will point up both the strengths and the weaknesses of the services being offered.

A third outcome of the project was the formation of the Consortium for Public Library Innovation and the commitment of this group to support the efforts of the Research Study Group as well as other programs designed to enhance library services. This group symbolizes the ongoing efforts of many public librarians who are genuinely interested in improving the overall performance of the library. An important function of the Consortium is to openly take on an advocacy role for services needed by making the most effective use of available data. Such a role will move the public library towards the establishment of meaningful priorities based on careful needs assessment.

A fourth outcome of the project was the identification of the conditions which must be met for the Learners Advisory Service to succeed in any given library. These conditions are as follows:

- The top administration must be actively in support of the service.
- The central facility (in the case of the multi-unit library) must be deeply involved in providing the service.
- The key library policy makers must establish a personnel system which recognizes and rewards outstanding performance and does not reward "non-professional" attitudes and behavior. The Learners Advisory Service will not persist and become integrated into the library if allowed to develop on a purely "volunteer" basis or when top administration accepts de facto rejection of the service by any middle manager.
- The service planners must continually monitor service provision procedures to insure that advisors continue to offer the service as planned. In any situation where innovative programs are being tested, there is a propensity for new procedures to be rejected or ignored due to uncertainty, unfamiliarity and lack of understanding. Unless constant attention is given to this problem, procedures revert to old habits.

A fifth outcome of the project was the identification of background and training requirements associated with designing, modeling and implementing a new service concept. The training provided through the National Office on program planning and evaluation appears to have been adequate in terms of instructing librarians in the use of a planning and evaluation model. However, the effective application of these techniques depends on the ability of the librarian planner to conceptualize and describe the service to be offered. The fact that it took nearly two years to adequately describe the basic elements of the Learners Advisory Service indicates a need for education in the areas of requirements analysis and system development. These skills are important to future efforts directed toward service description and modeling. Such modeling is critical in that it provides a basis for objective analysis. Poor conceptualizations of service lead to highly personalized and subjective views of activities. The question is whether librarians should be provided with the education necessary to operate as researchers or whether they should be educated in ways that allow effective communication with system designers and that provide the ability to interpret and apply research results to issues of library policy. There is an urgent need for an extensive dialogue among library educators with those in the field to explore at least the legitimacy of the issue raised above. Hopefully, the Consortium for Public Library Innovation will become a key catalyst in generating such a dialogue. The same need exists with the various professional associations, at the national, regional and state levels and efforts are currently being pursued in this area by the Consortium leadership.

APPENDIX A

ADVISORY AND INFORMATION SUPPORT SERVICES

Description of Service

A. Advisory Service

The primary function of the advisory service is the development of a learning plan which matches the needs of the adult independent learner. This plan includes a description of proposed learning activities and the sequence and timing associated with their accomplishment. The creation of a learning plan involves in-depth communication and understanding between the learner and the advisor. This may require one or several working sessions. The most effective learning plan is one which accounts for all the preferences and background experiences of the learner. There are several steps which the advisor and the learner take to reach an effective plan. These steps have evolved out of the work experience of advisors during the service test.

Interviews with advisors at Atlanta, Tulsa and Portland about their work with learners provides the basis for the following procedural description of the advisory service. The first step the advisor takes with a potential adult learner is to describe the advisory and information support services of the library. An essential part of this description is an expianation of the roles the learner and the advisor will play in the accomplishment of a learning project. It is necessary that the learner understand that the advisor's role is to guide and assist; the learner makes the decisions. An important aspect of the initial contact with the learner is making him/her feel comfortable with the advisor and with the processes of the advisory service. The second step involves explaining to the learner the kinds of information the advisor will ask for during the interview; demographic characteristics so the library can determine who they are helping with the service; learning project characteristics so the advisor can develop an understanding of the learner and his/her learning needs. The third step toward learning plan development is

to collect demographic information from the learner. A description of the learner's occupation and his/her level of education may be of use to the advisor in determining strategies for assisting the learner.

The description of learning project characteristics begins with the fourth procedural step. This step involves obtaining a description of the learner's goal. The advisor asks a series of questions to determine why the learner is interested in performing a project: Is it for academic credit, for job advancement, to acquire a skill? The fifth step is to determine what the learner wants to learn; the content scope of the project. If the content is too broad or if the learner is uncertain, the advisor provides assistance in defining the scope. This may be accomplished by outlining a number of alternatives for the learner to consider. Information about the learner's background in the selected content area can be used as a guide in limiting project scope. The sixth step is to describe how the learner prefers to learn. In order to effectively assist in the planning process the advisor must understand the media preferences (e.g., books, films, small group discussions) and the location preferences (e.g., library, home, classroom) of the learner. The integration of information on goals, content scope, background experience and learning styles forms the basis for the learning plan. The final step involves working with the learner to select a logical sequence of learning activities to meet his/her learning goals and to satisfy his/her content interests.

Information obtained at each step in the learning plan development process may be modified or elaborated as the learning project continues. Changes in project goals and scope lead to changes in the learning plan. The learning plan, then, is a flexible guide to accomplishing learning goals.

B. Information Support Services

Information support services include selection of library materials, development of study aids and identification of community resources. These services are used to implement the learning plan. Selection of materials usually begins

by searching the print and non-print resources of the library. If appropriate materials are not located then inter-library loan is used or selected purchases are made.

Two approaches have been used in developing study aids to assist the learner in integrating his/her program of learning. In the first approach the advisor creates an individually tailored study aid for the learner through the use of standard bibliographic tools. In the second approach, a group of librarians with expertise in a selected content area work together to develop a study aid for general use. This second approach is used when a common need is identified among learners using the service.

The selection of appropriate community resources is accomplished through the use of community resource referral files. In most of the libraries these files were developed as a result of the service plan. Some referral files were designed around educational opportunities in the community, others contain a broader information base consisting of educational institutions, service organizations, local businesses and individuals. One library has developed a data bank which includes all library and community resources related to adult independent learning. The selection of organizations and individuals to be included in these files has been based on general assessments of learner needs and on requirements identified in specific learning projects. In addition to developing community resource files some libraries have created files containing information of selected library personnel, their areas of content specialization and their willingness to work with learners. The development, maintenance, and updating of all of these files has required substantial time and effort. Two referral procedures have been used by advisors. The first procedure is for the advisor to contact the agency or individual and set up an appointment for the learner. The second procedure is to provide the learner with information on who to contact; the learner takes the responsibility for making the appointment.

An essential element in the provision of support service is evaluation. All materials, study aids and referrals provided by the advisor are evaluated by the learner in terms of usefulness to the learning project. These evaluations occur throughout the conduct of the project. The evaluation process provides direction to the advisor and the learner in the further selection of resources to implement the study plan.

APPENDIX B

DATA COLLECTION FORMS AND RECORDING INSTRUCTIONS

Data Collection Forms and Recording Instructions

There are eight forms to be used for data collection. These forms include: Interview, Progress Report, Progress Evaluation Interview, Material Worksheet, Referral Worksheet, Learner's Evaluation, Learner's Advisor Evaluation, and Time Record. Both the format of the forms and the working of the questions are a result of extensive planning and testing by the nine libraries who are implementing advisory services to independent adult learners.

The forms have been designed to serve two purposes. The first purpose is to provide a record of the learning project at the working level. That is, to provide information that is useful to both the advisor and the learner throughout the learning project. The second purpose is to obtain data which can be aggregated for all learners. This aggregation can be used to examine general characteristics of learners, types of service provided, judged usefulness of service, and staff time required. Detailed descriptions of each form and its purpose are presented in the following pages.

A. Form A: Interview

Information is recorded on the Interview form by the advisor during the first meeting with the learner. Each learner is assigned an Identification Number to facilitate the analysis of this information by computer. This number will be assigned at a central location prior to the distribution of forms packages to learner's advisors and it appears in the lower right hand corner of Form A. The purposes of this form are to provide basic demographic information about the learner, to provide a first rough description of the learning project and to serve as a record of advisory and information services in the first session. The form is divided into three sections corresponding to these purposes. Preceding the three sections are three items. The first item indicates whether the interview was conducted in person or by telephone. The second and third items are the date and time of the interview. The time

will show the length of the interview as well as when it occurred during the day. This information is needed for scheduling: when and for how long should the advisor plan to be available.

1. General Information About Learner

The first section of the interview form is designed to obtain general information about the learner. The items included in this section are:

- Name, Address, Telephone Number: Where can the learner be contacted and when is the best time for the advisor to call?
- Sex: This breakdown is needed for demographic comparisons with the population.
- Residence: Is the learner a resident of the area surrounding the library? Is the learner within the legal jurisdiction of the library? Basically, where are the learners coming from?
- Occupation: What is the specific occupation of the learner? Occupation may have some bearing on the learner's goal or area of interest. The occupational categories may be used as a guide to describing specifically what the learner does. These categories were chosen to correspond with the census breakdown so that comparisons could be made with the population. The categorization of occupation will be done by the coder; the specific occupation should be recorded by the advisor.
- Age: How old is the learner? The age ranges selected are the ones used by the census; this allows for comparison with the population. Additionally, age may be one of the demographic characteristics that influence the type of learning project.
- Previous Library Use: Is the learner a library user? Has he/she used your library? Other libraries? Is he/she a new user? The frequency of use values on these items correspond to categories used in national library surveys. The main concern is: are non-library users being attracted to the advisory service? One of the service goals of your library may have been to attract new library users.
- Library Card: If the learner is a previous user of your library does he/she have a library card? If your library does not have cards, check the space labeled NA.

The purpose of this form is to provide the advisor with information about the learner and to provide both the advisor and the learner with a common basis for working through the learning project. This form should be filled out by the advisor.

INTERVIEW I.D. No. _____

Interview Conducted: __ Phone Date _____

__ In person Time: Begun _____ End _____

General Information About Learner

1. Learner _____ 2. M__ F___

3. Address _____
Street City State Zip

4. _____
Home Phone Business Phone Best Time to Call

5. __ Resident __ Non-Resident __ In Service Area

6. Specific Occupation _____

7. Occupational Category: (Coder will complete)

__ Housewife __ Manager, Administrator __ Retired
__ Blue Collar Worker __ Other White Collar Worker __ Student
__ Professional __ Unemployed

8. Age: (Circle one) -18 18-24 25-34 35-44 45-54 55-64 65+ NR

9. Use of Project Library:

__ Once or more a month __ Less than once a year
__ Once or more every 6 months __ Never
__ Once or more a year

10. Use of Other Libraries:

__ Once or more a month __ Less than once a year
__ Once or more every 6 months __ Never
__ Once or more every year

11. Library Card: __ Yes __ No __ NA

12. Learned of Learners Advisory Service through:

__ TV __ Radio __ Newspaper __ Library Display __ Community Display
__ Librarian __ Word of Mouth __ Another Agency __ Community Outreach
__ Other (specify) _____

13. Education Completed:

__ 8th Grade or Less __ Some High School __ High School Graduate
__ Some College __ BA __ Graduate Work

Elaborate _____

Form A, pg 1

- Publicity: What publicity medium attracted the learner to the advisory service? Here only one medium should be checked? the medium that brought the learner to the service. The purpose is to determine what forms of publicity are most effective in attracting learners.
- Education: How much education does the learner have? The level of education may influence the kinds of materials provided to support the learning project. The education breakdown comes from the census so that comparisons can be made with the population. An elaboration line is included here so that the advisor can record pertinent information concerning major areas of study.

2. Description of Learning Project

The second section of the Interview form concerns the description of the steps involved in diagnosing the learning need and in developing a learning plan. Completion of these items should provide the learner and the advisor with a shared understanding of what the learner wants to achieve, what the learner already knows and some general plan for moving from where the learner is to where he/she wants to be. Under each of these questions space has been provided to elaborate on the learner's explanation. This space should be used by the advisor to clarify and further describe the learner's choices. It may be necessary to meet with the learner more than once to obtain all of the information for this section. The number of meetings will depend on how well the learner understands his/her learning need. The items included in this section are:

- Learning Goal: What does the learner want to achieve? The alternatives listed in this question should serve as a guide to the learner's advisor in helping the learner specify a goal. The two alternatives, increase knowledge and increase skill are distinct from credit or job advancement in that they relate to the learner's desire just to find out more about an area. The advisor checks only one goal category for each learner. This will indicate the primary motivation for wanting to learn. The specification of the goal should be recorded under "Elaborate Goal". If a secondary goal is indicated, it can be described in this space.

- Area of Learning Project: What is the content area the learner is interested in? The alternatives listed correspond to the Dewey System. The elaboration of the learning interest should be used by the advisor as an aid to understanding what the learner wants to learn; specification and understanding of content is critical to the advisor's ability to support the learner. Here, again, only one content category should be checked to indicate the major area of interest.

- Background in Learning Area: How much does the learner already know in the selected content area? This will indicate where he/she is now; where the advisor should begin the support. Any specific information should be recorded under "Elaborate Background".

- Preferred Learning Method: How does the learner like to learn? Some alternatives are books, audio-visual, informal discussions, programmed instruction,* etc. This information will help the advisor in planning support for the learning project. In this question the most preferred method should be checked. If additional methods are also indicated by the learner these can be discussed on the elaboration line.

- Preferred Learning Location: Where does the learner like to learn? Home? Library? Classroom? Here again, the response to this item will influence the support provided. The most preferred location should be checked, with elaboration provided below.

- Ways of Helping the Learner: What approaches to learning does the advisor recommend based on the goal, the content, the learner's background and the learner's preferences for method and location of learning?

- Sequence of Learning Project: Where does the advisor feel the learner should start the project: type of material, level of sophistication, volume of material at one time, etc.? What steps should follow in moving the learner from starting level to project goal?

*Special manuals which lead the learner through a content area. Such manuals usually include tests.

Description of Learning Project

14. Learning Goal(s) (Select one):

__ Educational credit
__ Job advancement or change
__ Increase knowledge
__ Increase skill
__ Meet people with common interests
__ Contribute to community
__ Pleasure and recreation

Elaborate Goal: _____

_____

_____

15. Area of Learning Project (Select one):

__ Philosophy
__ Religion
__ Social Sciences
__ Language
__ Pure Science
__ Technology, Applied Science
__ Arts
__ Literature
__ General Geography and History

Elaborate Area of Interest: _____

_____

_____

16. Background knowledge/skill in learning area:

__ No experience __ Some experience __ Expert

Elaborate Background: _____

_____

_____

17. Learning method preferred by learner (Select one):

__ Books
__ Audio Visual
__ Programmed Instruction
__ Formal Classes
__ Informal Discussions
__ Other

Elaborate Learning Method _____

_____

18. Learning location preferred by learner (Select one):

__ In Library __ In Classroom __ At Home __ Other

Elaborate Location _____

_____

19. Possible ways of helping the learner meet learning goal(s): _____

_____

_____

20. Recommended sequence of learning project (where to begin and steps to follow):

_____

_____

_____

_____

Form A, pg 2

3. Advisory/Information Support Services

The third section of the Interview form deals with the Advisory and Information Support services provided by the advisor during the first meeting with the learner. That is, what was done for the learner this time and what preparations will be made for the next meeting. It is important to keep records on what was done for two reasons. First, it helps the advisor know what has been accomplished so far. Second, when this information is aggregated across learners a picture of the process begins to emerge; that is, what happens at each meeting with the learner. Items included in this section are:

- Advisory Service: What was done toward learning plan development? How far did the advisor and the learner go in defining goals, bounding project content, etc.? For this item multiple alternatives may be checked.

- Information Support Service: Was the learner given any information support? Some alternatives are materials, referral, study guide, etc. Here, again, multiple responses may be made.

- Steps To Be Taken Before Next Appointment: What does the advisor need to do to prepare for the next meeting — locate materials, make telephone calls, etc.?

- Next Appointment Date: When does the learner expect to return for further discussion with the advisor? If a specific time can be set this should assist the advisor in scheduling his/her time.

Advisory Service

21. __ Explaining independent learning program
__ Defining project scope
__ Clarifying learning goals
__ Developing learning sequence

Elaborate service(s) _____

_____

_____

_____

Information Support Service

22. __ Provide materials
__ Refer outside library
__ Refer inside library
__ Gather information
__ Provide study guide
__ Other (specify) _____
__ Provide reading list

Elaborate service(s) _____

_____

_____

Steps to be taken before next appointment _____

_____

_____

_____

Next appointment date _____

Comments _____

_____

_____

_____

_____

_____

Learner's Advisor _____

Form A, pg 3

B. Form B: Progress Report

A Progress Report form is filled out by the advisor for each meeting with the learner following the initial interview. Even if the advisor must go back to the Interview form to complete the Project Description section, a Progress Report should be filled out to indicate date, time, type of contract, services, and actions. The purpose of the Progress Report is to maintain a continuing record of the learning project. This form is divided into two sections: Modifications in Learning Project, and Advisory/Information Support Services. The section on learning project modifications includes items on changes made by the learner or the advisor as a consequence of events that have occurred between meetings. These items are:

- Changes or Elaborations in Learning Goal(s): Has the learner rethought his/her goals? Has reading or discussion changed what he/she wants to accomplish?
- Changes in Scope of Area of Interest: Has the learner changed the breadth or depth of his content interest? Has the content area become better defined?
- Changes in Ways of Helping the Learner Meet the Goal(s): Has the advisor or the learner come up with new thoughts on how the learning project should be accomplished?
- Changes in Sequence of Learning Project: Are there steps that can be eliminated based on what the learner has accomplished between meetings? Are there steps that need to be added? Does a change in learning goal or content scope require a change in the learning plan sequence?

The section on Services includes the same items as the corresponding section of the Interview form. Again, multiple responses may be made under each item. The purpose here is to obtain an accurate record of what was done for the learner during each meeting.

The purpose of this form is to provide a record for the learner and the advisor of the learner's progress. This form should be filled out by the advisor.

PROGRESS REPORT I.D. No. _____

Contact: __ Phone Date: _____

__ In Person Time: Begun _____ End _____

Learner _____ Visit No. _____

Modifications in Learning Project

1. Changes and/or elaborations in learning goals: _____

_____

_____

2. Changes in scope of area of interest: __ Broader __ Narrower

3. Elaborations of changes in area of interest: _____

_____

_____

4. Changes in ways of helping learner meet goals: _____

_____

5. Changes, elaborations in sequence of learning project: _____

_____

_____

Advisory Service

6. __ Explaining independent learning program __ Defining project scope
__ Clarifying learning goals __ Developing learning sequence

7. Elaborate service(s) _____

_____

Information Support Service

8. __ Provide materials __ Provide Study Guide __ Provide reading list
__ Refer outside library __ Refer inside library __ Gather information
__ Other (Specify) _____

9. Elaborate service(s) _____

10. Steps to be taken before next appointment _____

_____

_____

11. Next appointment _____

Learner's Advisor _____

Form B

C. Form C: Progress Evaluation Interview

A Progress Evaluation Interview is conducted with each learner following every two progress meetings. The form used in this interview is filled out by the advisor. The purpose here is diagnostic; to provide the advisor with periodic feedback from the learner on how the learner feels the project is going. Such feedback will allow the advisor to make adjustments in services as the project progresses. The items on this form include:

- Pace of Learning Project: Does the learner feel that the project is moving at the right speed? If the learner's answer is negative, what can the advisor do to change the situation?
- Meeting Goals: Does the learner feel the project is progressing towards his/her learning goals? If not, why and how can a positive change be made?
- Advisor Available: Does the learner feel the advisor has been available when needed or have there been scheduling problems? Can these problems be alleviated?
- Library Facilities: Does the learner feel that the library facilities have been adequate to meet his/her need? Can this situation be improved?
- Learning Plan: Does the learner feel the advisor has provided adequate guidance in learning plan development? If not, what should the advisor do?

The primary purpose of this form is diagnostic. It should help the advisor to adjust to the needs of the learner. This form should be filled out by the advisor in conversation with the learner.

PROGRESS EVALUATION INTERVIEW I.D. No. _____

Contact: __ Phone Date _____
__ In person

1. Learner's Name _____

2. Does the learner feel that the learning project is moving at an adequate pace?
__ Yes __ No __ Don't know
Elaborate: _____

3. Does the learner feel that he/she is progressing toward his/her learning goal?
__ Yes __ No __ Don't know
Elaborate: _____

4. Has the advisor been available when needed? __ Yes __ No
If "no" how can this problem be corrected? _____

5. Have the library facilities been conducive to the learner's project?
__ Yes __ No __ NA
If "no" how can this situation be improved? _____

6. Has the advisor provided the needed assistance in learning plan development?
__ Yes __ No __ Don't know
If "no" what should the advisor do? _____

Form C

D. Form D: Materials Worksheet

The purpose of the Materials Worksheet is to provide a central record of the materials given to the learner. Appropriate information should be added to this form by the advisor each time material is provided to the learner or each time the learner is asked to evaluate the usefulness of specific material. The information to be recorded on this form includes:

- Date Selected: When each piece of material was selected for the learner.
- Date Available: When each piece of material was provided to the learner.
- Type of Material: Some suggested material categories are – print media, visual media, audio media, study aids. A further breakdown within these categories is shown at the bottom of the form. These specific breakdowns may be used by the advisor.
- Description of Material: Short title, author and call number.
- Availability of Material: Was material held in the collection or was it necessary to borrow or buy it? Was the material on the shelf or in circulation? These boxes should be completed in accordance with the initial status of the material selected (what was the situation when availability was first checked). This information should serve as a useful input to future decisions on acquisitions.
- Usefulness of Material: Did the learner feel the recommended material was appropriate? If not, for what reason? Too old? Too advanced? Etc. Information of this type should help the advisor in future selections for the learner.

This form will provide a record of all material selected for the learner and the learner's evaluation of these materials. This form should be filled out by the advisor.

Learner _____ I.D. No. _____

MATERIALS WORKSHEET

Date Selected	Date Available	Type of Material*	Materials Description (Title and Call Number)	In Coll.		Not in Coll.		Usefulness							
				Available	Not Available	ILL	Ordered	Appropriate	Too General	Too Specific	Too Advanced	Too Elem.	Redundant	Irrelevant	Too Old

*Print Media: Books (inc. paper backs, pamphlets, periodicals, microform; Visual Media: Films, slides, film strips, pictures, video cassettes; Audio Media: Records, tapes; Study Aids: Bibliographies, study guides, reading lists.

B-17

E. Form E: Referral Worksheet

The purpose of the Referral Worksheet is to provide a central record of referrals made for each learner. The form should be filled out by the advisor. The information recorded will indicate the status and the usefulness of each referral. Such information will be of value for the advisor in suggesting additional agencies or individuals to assist the learner in his/her project. The worksheet calls for the following:

- Agency or Individual: The name, address, telephone number (as needed) of each agency or individual selected as a referral.
- Type of Referral: Four types of referrals have been identified: advisory outside the library, information support outside the library, advisory inside the library (e.g., one library agency to another) and information support inside the library. Advisory referrals are referrals where the learner will receive some consultation and guidance in his/her project; information support referrals are referrals where the learner will receive information, materials, etc.
- Agency Contact Date: The date the advisor contacts the agency/individual to schedule an appointment for the learner. If no appointment is made leave this space blank.
- Learner's Appointment Date: The date the learner is scheduled to meet with the agency/individual. If no specific appointment is made leave this space blank.
- Learner Used Referral: An indication of whether the learner kept the appointment; made use of the referral. A yes should be entered if the referral was used, a no if the referral was not used.
- Date Referral Followed Up: The date the advisor checked with the learner to determine if the referral was used and if the referral had been useful.
- Referral Useful: The usefulness of the referral as judged by the learner. A yes should be entered if the learner felt the referral was useful, a no if the learner felt the referral was not useful.
- Not Used or Not Useful: The reasons given by the learner as to why the referral was not used or if used, not useful.

This form will provide a record of all referrals made for a learner, an indication of whether appointments were kept and the usefulness of each referral as judged by the learner.

Learner _____

REFERRAL WORKSHEET

Agency/Individual	Type of Referral*	Agency Contact Date	Learner Appointment Date	Learner Used Referral (Yes-No)	Date Referral Followed Up	Referral Useful (Yes-Not)	If Not Used or Not Useful, Give Reason

*Advisory Referral Outside Library (AO), Information Support Referral Outside Library (IO), Advisory Referral Inside Library (AI), Information Support Referral Inside Library (II)

FORM E - ID No. _____

B-19

F. Form F: Learner's Evaluation

The Learner's Evaluation is filled out by the learner when the learning project is completed. The purpose of this form is to obtain the learner's overall impression of the advisory and information support services; the results provide the principal indication of service effectiveness. The eleven questions on the first page of the form deal with the adequacy of the advisor-learner relationship and with the usefuiness and availiability of selected information support services (e.g. materials, study aides, facilities, referrals, etc.). An example of question phrasing is: "Did the learner's advisor understand what you wanted to learn?" This format is used throughout the questions. The learner's job is to respond to each question by selecting one of five evaluative categories ranging on the low end from "never" to a response on the high end of "always". Questions 12 and 13 ask about continued use of the service or recommending the service to someone else. These questions are answered by a "yes" or "no". The final question is concerned with how the learner feels he/she had changed as a result of the learning project and the help of the service.

The purpose of this form is to get the learner's impressions of the advisory service. The learner fills out the form.

LEARNER'S EVALUATION

Questions	Evaluations				
	Never	Seldom	Sometimes	Often	Always
1. Was the library open when you needed it?					
2. Were the library facilities helpful to you in doing your learning project?					
3. Was the Learner's Advisor available when you wanted to talk?					
4. Were you comfortable in talking to the Learner's Advisor about what you wanted to learn?					
5. Did the Learner's Advisor understand what you wanted to learn?					
6. Was the Learner's Advisor helpful in developing a plan for your learning (helping you decide how to begin and what to do)?					
7. Were the right materials (books, tapes, etc.) available when you needed them?					
8. Were the materials given to you by the Learner's Advisor useful in helping you learn what you wanted to learn?					
9. If you used a learning guide in your learning, was it helpful?					
10. If you were referred to another agency did that agency help you in your learning project?					
11. Overall were you satisfied with help provided to you by the Learner's Advisory Service?					

Form F _____

12. Would you use the service again?

Yes ___ No ___ Don't know ___

13. Would you recommend the service to someone else?

Yes ___ No ___ Don't know ___

14. How do you think you have changed as a result of your project and the help the library has provided? _____

_____

_____

_____

_____

_____

Learner's Name _____

Date _____

Form F, pg 2

G. Form G: Learner's Advisor Evaluation

The purpose of the Learner's Advisor Evaluation form is to obtain the advisor's overall evaluation of the experience with the learner. This form should be filled out by the advisor for each learner upon completion of the learning project. The questions asked of the advisor are the same as those used with the learner. The advisor is expected to answer each question on a scale from "never" to 'always" based on how well the advisor feels the service has worked for the learner. The final question deals with how the advisor feels the learner has changed as a result of the learning project. Since the questions asked of the learner and the advisor are the same, comparisons can be made between the two evaluations, the two perceptions of service value to the learner.

The purpose of this form is to obtain the advisor's overall evaluation of the experience with the learner. Advisors fill out this form.

LEARNER'S ADVISOR EVALUATION

Learner's Name _____ I.D. No. _____

Questions	Evaluations				
	Never	Seldom	Sometimes	Often	Always
1. Was the learner comfortable in talking to you about what he/she wanted to learn?					
2. Did you understand what the learner wanted to learn?					
3. Were you helpful in developing a learning plan?					
4. Were you available when the learner wanted to talk?					
5. Were appropriate materials available for the learner when he/she needed them?					
6. Were the materials that you provided the learner useful in helping him/her reach his/her learning goal?					
7. If you provided a learning guide was it useful to the learner?					
8. If you referred the learner to an outside agency was this agency helpful to the learner					
9. Overall were you satisfied with how you helped the learner with his/her learning project?					

10. Did you feel you had enough time to work with the learner?

Yes ___ No ___

If "no", please comment _____

_____

_____

11. Were the facilities and equipment in the library sufficient for what you needed to help the learner?

Yes ___ No ___

If "no", please comment _____

_____

_____

12. Did you see indications of change in the learner as a result of his/her project?

_____

_____

_____

_____

_____

Learner's Advisor _____

Advisor's I.D. No. _____

Date _____

Form G, pg 2

H. Form H: Time Record

The Time Record is to be kept by the advisor on the work done for the learner; a separate time record is used for each learner. The purpose of this form is to provide information on how much time is spent in doing tasks to support a learning project both when the learner is present and between learner-advisor contacts. This information is needed for projecting staffing requirements associated with selected levels of service planned in the future. The tasks listed on the left-hand side of the form have been derived empirically; they have come from the experiences of libraries pilot testing advisory and information support services. Each time the advisor does some work on the learner's project (e.g. meeting with the learner, locating/ ordering materials, evaluating materials, etc.) the date should be recorded and the time expended should be listed next to the appropriate tasks.

The purpose of this form is to provide information on how much time is spent in doing tasks to support a learning project. This information is essential for planning the staff levels needed for future service to the adult independent learner. This form is to be filled out by the advisor each time some work is done when the learner is present and between contacts.

TIME RECORD

Advisor's Name _____

Learner's Name _____

Date	Amount of time spent per function					Total
Discussion between consultant and learner						
Discussion between consultant and other staff or administration						
Bibliographic, file or agency searches						
Locating or ordering materials						
Background reading and think time (planning)						
Evaluating materials						
Reserving materials						
Developing study aids						
Referral or direction to other than library sources or agencies						
Completing data forms						
Typing or filing, xeroxing						

Form H - I.D. No._____